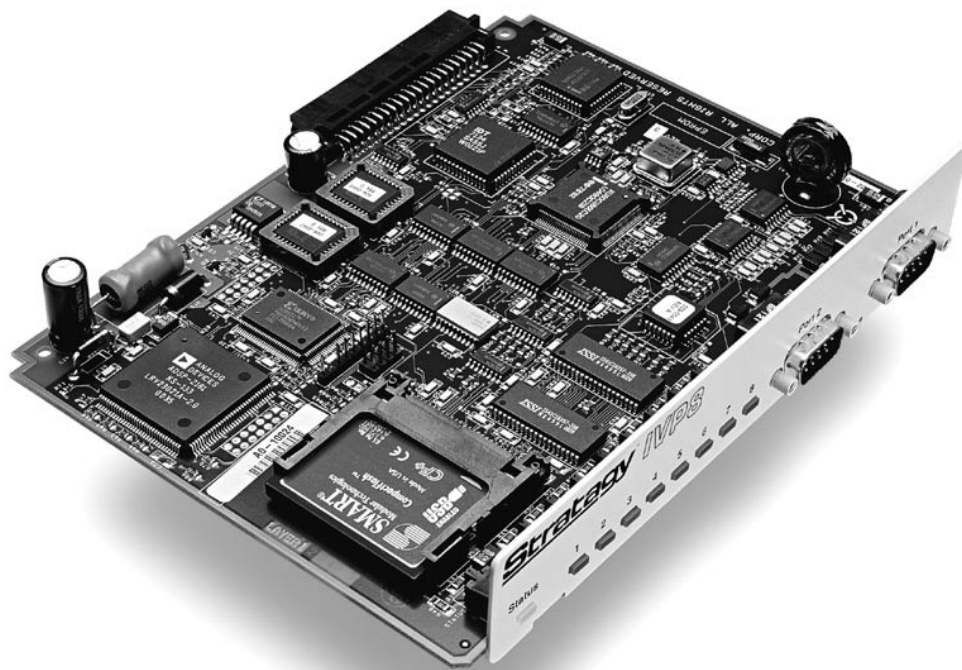


**TOSHIBA**

# **Installation Guide**

## **Stratagy IVP8**



**STRATAGY**

# **Voice Processing**

# Stratagy IVP8 General End User Information

The Stratagy IVP8 Voice Processing Systems are registered in accordance with the provisions of Part 68 of the Federal Communications Commission's Rules and Regulations.

## FCC Requirements

**Means of Connection:** The Federal Communications Commission (FCC) has established rules which permit the Stratagy systems to be connected directly to the telephone network. Connection points are provided by the telephone company—connections for this type of customer-provided equipment will not be provided on coin lines. Connections to party lines are subject to state tariffs.

**Incidence of Harm:** If the system is malfunctioning, it may also be disrupting the telephone network. The system should be disconnected until the problem can be determined and repaired. If this is not done, the telephone company may temporarily disconnect service. If possible, they will notify you in advance, but, if advance notice is not practical, you will be notified as soon as possible. You will be informed of your right to file a complaint with the FCC.

**Service or Repair:** For service or repair, contact your local Toshiba telecommunications distributor. To obtain the nearest Toshiba telecommunications distributor in your area, log onto [www.Toshiba.com/TAISTSD/Locator.htm](http://www.Toshiba.com/TAISTSD/Locator.htm) or call (800) 222-5805 and ask for a Toshiba Telecom Dealer.

**Telephone Network Compatibility:** The telephone company may make changes in its facilities, equipment, operations, and procedures. If such changes affect the compatibility or use of the Stratagy system, the telephone company will notify you in advance to give you an opportunity to maintain uninterrupted service.

**Notification of Telephone Company:** Before connecting a Stratagy system to the telephone network, the telephone company may request the following:

1. Your telephone number.
2. FCC: Tested to comply with FCC standards.
3. Ringer equivalence number: 1.1B. The ringer equivalence number (REN) is useful to determine the quantity of devices which you may connect to your telephone line and still have all of those devices ring when your number is called. In most areas, but not all, the sum of the RENs of all devices connected to one line should not exceed five (5.0B). To be certain of the number of devices you may connect to your line, as determined by the REN, you should contact your local telephone company to ascertain the maximum REN for your calling area.
4. Network connection information Universal Service Order Code (USOC) jack required: RJ11C, RJ21X.
5. Facility Interface Code (FIC): 02LS2
6. Service Order Code (SOC): 9.0F

## Radio Frequency Interference

**Warning** This equipment generates, uses, and can radiate radio frequency energy and if not installed and used in accordance with the manufacturer's instruction manual, may cause interference to radio communications. It has been tested and found to comply with the limits for a Class A computing device pursuant to Subpart J of Part 15 of FCC Rules, which are designed to provide reasonable protection against such interference when operated in a commercial environment. Operation of this equipment in a residential area is likely to cause interference, in which case, the user, at his/her own expense, will be required to take whatever measures may be required to correct the interference.

This system is listed with Underwriters Laboratory.

## Important Notice — Busy-hold Music

In accordance with U.S. Copyright Law, a license may be required from the American Society of Composers, Authors and Publishers, or other similar organization, if radio or TV broadcasts are transmitted through the Busy-hold Music feature of this voice processing system. Toshiba America Information Systems, Inc., hereby disclaims any liability arising out of the failure to obtain such a license.

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Version A, January 2002

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# **Toshiba America Information Systems, Inc.**

## **Telecommunication Systems Division**

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Toshiba America Information Systems, Inc., ("TAIS") warrants that this voice processing equipment (except for fuses, lamps, and other consumables) will, upon delivery by TAIS or an authorized TAIS dealer to a retail customer in new condition, be free from defects in material and workmanship for twenty-four (24) months after delivery. This warranty is void (a) if the equipment is used under other than normal use and maintenance conditions, (b) if the equipment is modified or altered, unless the modification or alteration is expressly authorized by TAIS, (c) if the equipment is subject to abuse, neglect, lightning, electrical fault, or accident, (d) if the equipment is repaired by someone other than TAIS or an authorized TAIS dealer, (e) if the equipment's serial number is defaced or missing, or (f) if the equipment is installed or used in combination or in assembly with products not supplied by TAIS and which are not compatible or are of inferior quality, design, or performance.

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Under no circumstances will the retail customer or any user or dealer or other person be entitled to any direct, special, indirect, consequential, or exemplary damages, for breach of contract, tort, or otherwise. Under no circumstances will any such person be entitled to any sum greater than the purchase price paid for the item of equipment that is malfunctioning.

To obtain service under this warranty, the retail customer must bring the malfunction of the machine to the attention of one of TAIS' authorized dealers within the twenty-four (24) month period and no later than thirty (30) days after such malfunction, whichever first occurs. Failure to bring the malfunction to the attention of an authorized TAIS dealer within the prescribed time results in the customer being not entitled to warranty service.

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No TAIS dealer and no person other than an officer of TAIS may extend or modify this warranty. No such modification or extension is effective unless it is in writing and signed by the vice president and general manager, Telecommunication Systems Division.

# Before You Install Strategy in Strata CTX...

please read and complete both sides of this checklist.

This checklist only highlights important installation information. Please reference the *Strategy IVP8* or *Strategy DK Installation Guide* for details on programming individual features, etc. **Unless otherwise noted in these instructions, references to Strategy apply to both the Strategy DK (Release 3.3) and Strategy IVP8 products.**

---

**CAUTION!** After making any significant program changes to the Strategy, it is recommended the system be properly shut down and restarted. This copies the most current database to the C:\Strategy\Archive\Good directory for use by the Automatic System Recovery feature (see [“Automatic System Recovery” on page 42](#) in the *Strategy IVP8* or *Strategy DK Installation Guide*). Failure to do so could result in the loss of customer information if the system loses power before it is properly shutdown and rebooted.

---

## 1 Are you aware of the prescribed handling precautions for the Strategy?

*Whenever handling Strategy, always wear the **anti-static wrist strap** (included); keep the strap by the unit.*

- ☐ **Always hold the unit by its edges.** Remember that an electrostatic charge from your body, even your own body oils can damage the Strategy.
- ☐ **Never drop or jar the Strategy!** Care should be taken whenever handling the unit.
- ☐ Temperature changes greater than 20°F cause condensation on Strategy's hard drive. If there is such a temperature variation, wait 24 hours before installation.
- ☐ Always keep the Strategy in its individual shipping box until it's time to install it in the Strata CTX.
- ☐ Never transport the Strategy inside the Strata CTX.

## 2 Do you have everything you need for programming Strategy using Strategy Admin?

*Strategy Admin Release 3 software is only supported with the Strategy Flash, Strategy DK Release 3 and Strategy IVP8. Use with any Release 2 Strategy system may cause erratic behavior.*

- ☐ **Local Administration?** You'll need a PC, 5MB hard drive space, 3.5" 1.44 floppy drive, and 580KB free RAM. You'll also need a 9-pin null-modem serial cable or Toshiba's SG-ADMCBL cable to connect your PC to the Strategy.
- ☐ **Remote (modem) Administration?** Use Strategy Admin software with Strategy's internal (soft) 2400-baud modem. No additional equipment is necessary.  
...or use Toshiba's 9600 baud SG-FMOD modem or a Hayes-compatible, 14.4 baud, V32.bis modem connected to Strategy's serial Port 2. You'll need a customer-supplied 9-pin serial cable.

## 3 Is the Strata CTX ready?

*Strategy is compatible with all Strata CTXs. Strata CTX needs to recognize Strategy's DTMF signaling. An ARCS card must be installed in the Strata CTX100 for this DTMF signaling. Strata CTX670 allows four DTMF circuits in its default configuration.*

- ☐ Install and program an ARCS card in the Strata CTX100. When installed, the ARCS card by default allows four circuits. Additional licenses may be required, depending upon the Strata CTX configuration and applications.
- ☐ Program slot in Strata CTX **before** installing the Strategy. Refer to *Strata CTX Programming Manual* for details.

## 4 Do you want to activate the DSS/Busy Lamp feature?

*PDKU/BDKU cards must be installed and programmed for a DSS Console.*

- ☐ Install and program the PDKU/BDKU in the Strata CTX.
- ☐ Refer to the *Strata CTX Programming Manual* for DSS programming.
- ☐ Set the *dss\_active* parameter to TRUE.
- ☐ Configure the *DSS Port* field on the User Menu – Options screen for each mailbox.

## 5 Are you going to have SMDI?

*SMDI is required for the Call Record feature with Strategy Release 3.3/IVP8. A BSIS card must be located close to the Strategy.*

- ☐ Install and program serial card BSIS in the Strata CTX. Refer to the *Strata CTX Programming Manual*.
- ☐ A serial cable must be installed between the BSIS card and the Strategy. Toshiba's PPTC-9 (with six-conductor line-cord) is recommended.
- ☐ Strategy's serial Port 1 is reserved for SMDI communication.

## 6 Want to synch. Strategy system time with Strata CTX?

*SMDI is required if the Strategy is going to be synched with the Strata CTX system time. Night Transfer Alternate Routing and Busy Station Identification do not require SMDI.*

- ☐ For clock synch, you must configure the *ksu\_time* parameter and connect SMDI.
- ☐ For Night Transfer Alternate Routing and Busy Station Identification, you must configure the *console\_slot\_ID* and *DSS\_active* parameters.

## 7 All set? Just a few more things...

- ☐ Be sure to change the default password of the Shutdown Mailbox User ID 983 (see [page 40](#) in the *Strategy IVP8 or Strategy DK Installation Guide*).
- ☐ Don't forget to wear the **anti-static wrist strap** during handling.
- ☐ When using an internal modem in the Strategy Admin PC, remember that Strategy Admin **does not** work with COM 3 or 4. Do not write over the Strategy Admin subdirectory on your remote PC when installing the newer version of Strategy Admin. Always retain previous versions of Admin.
- ☐ Make sure your *Strata I&M/Programming Manuals* and *Strategy I&M Manuals* are handy. **Be sure to read the entire Strategy IVP8 or Strategy DK Installation Guide before installing.**
- ☐ Remember to back up your database after installation.

*If you have read and completed this checklist, installation will be a breeze!*

**OK, let's get started!**

# Before You Install Strategy in Strata DK...

please read and complete both sides of this checklist.

This checklist only highlights important installation information. Please reference the *Strategy IVP8* or *Strategy DK Installation Guide* for details on programming individual features, etc. Unless otherwise noted in these instructions, references to Strategy apply to both the Strategy DK (Release 3.3) and Strategy IVP8 products.

**CAUTION!** After making any significant program changes to the Strategy, it is recommended the system be properly shut down and restarted. This copies the most current database to the C:\Strategy\Archive\Good directory for use by the Automatic System Recovery feature (see [“Automatic System Recovery” on page 42](#) in the *Strategy IVP8* or *Strategy DK Installation Guide*). Failure to do so could result in the loss of customer information if the system loses power before it is properly shutdown and rebooted.

## 1 Are you aware of the prescribed handling precautions for the Strategy?

Whenever handling Strategy, always wear the *anti-static wrist strap* (included); keep the strap by the unit.

- ☐ **Always hold the unit by its edges.** Remember that an electrostatic charge from your body, even your own body oils can damage the Strategy.
- ☐ **Never drop or jar the Strategy!** Care should be taken whenever handling the unit.
- ☐ Temperature changes greater than 20°F cause condensation on Strategy’s hard drive. If there is such a temperature variation, wait 24 hours before installation.
- ☐ Always keep the Strategy in its individual shipping box until it’s time to install it in the Strata DK.
- ☐ Never transport the Strategy inside the Strata DK.

## 2 Do you have everything you need for programming Strategy using Strategy Admin?

*Strategy Admin Release 3 software is only supported with the Strategy Flash, Strategy DK Release 3 and Strategy IVP8. Use with any Release 2 Strategy system may cause erratic behavior.*

- ☐ **Local Administration?** You’ll need a PC, 5MB hard drive space, 3.5” 1.44 floppy drive, and 580KB free RAM. You’ll also need a 9-pin null-modem serial cable or Toshiba’s SG-ADMCBL cable to connect your PC to the Strategy.
- ☐ **Remote (modem) Administration?** Use Strategy Admin software with Strategy’s internal (soft) 2400-baud modem. No additional equipment is necessary.  
...or use Toshiba’s 9600 baud SG-FMOD modem or a Hayes-compatible, 14.4 baud, V32.bis modem connected to Strategy’s serial Port 2. You’ll need a customer-supplied 9-pin serial cable.

## 3 Is the Strata DK ready?

*Make sure Strategy is compatible with your Strata DK. It works with Strata DK424i, DK424/DK280 and DK40i/DK40/DK16e/DK16 systems and DK24/DK56/DK96 with Release 4 software.*

- ☐ Always program Strata DK slot assignments **before** installing the Strategy. Use these slot assignments:

DK424i/DK424	DK280 (R3 or Higher)	DK40i/DK40/DK16e/DK16	DK24/DK56/DK96
Use a universal slot, starting with slot 12 or 13 (if an RSIU is in slot 11); never use slots 27, 28, 31, 37, 38, 47, 48, 51, 57, 58, 67, 68, 71, 77, or 78.	Use any universal slot, starting with slot 12 (if a PDKU or PEKU is in slot 11) or slot 13 (if an RSIU is in slot 11); never use slots 31 or 51.	Use any expansion cabinet slot that takes an eight-port card ( <b>except slot 18 in the DK40i/DK40/DK16e</b> ).	Use any slot after slot 01.

- ☐ Be sure to set the correct code in Strata DK programming for the slot where Strategy is installed.
- ☐ Always remember to **shut down** Strategy software **before** powering down Strata DK (see [page 40](#) in the *Strategy IVP8* or *Strategy DK Installation Guide*).



# 4

## Is Strata DK's DTMF tone detection enabled?

*Strata DK needs to recognize Strategy's DTMF signaling.*

- ☐ Make sure an RRCS is installed on the DK424i/DK424/DK280 RCTU, a K5RCU, K5RCU2 or K4RCU3 in the DK40i/DK40/DK16e/DK16, or CRCU in the DK24/DK56/DK96.
- ☐ Run Program 03 and assign these code(s) where the DTMF receiver is installed:

DK424i/DK424/280	DK40i/DK40/DK16e/DK16	DK24/DK56/DK96
Code 92, 93, or 94 for slot 00	Code 92 for slot 00	Code 92 or 93

# 5

## Do you want to activate the DSS/Busy Lamp feature?

*A PDKU card must be installed that is programmed for a DSS Console.*

- ☐ Install and program the PDKU:
  - DK424i/DK424/DK280:** When installing the Strategy in an odd-numbered cabinet, make sure the PDKU is in a lower-numbered slot in the same cabinet. When installing in an even-numbered cabinet, the PDKU must be in a lower-numbered slot in the preceding odd-numbered cabinet.
  - DK40i/DK40/DK16e:** set slot 11 in the Base Cabinet to code 64.
  - DK24/DK56/DK96:** the PDKU must reside in slot 01.
- ☐ Set code 64 using Program 03 for the PDKU slot.
- ☐ Set the *dss\_active* parameter to TRUE.
- ☐ Configure the *DSS Port* field on the User Menu – Options screen for each mailbox.

# 6

## Are you going to have SMDI?

*A PIOU/PIOUS, RSSU, or RSIU/RSIS card must be located close to the Strategy.*

- ☐ **Strata DK424i/DK424/DK280:** SMDI is available on all processors. The A processor must have Release 3.1 software or higher.
- ☐ Set code 43 in Program 03 for PIOU/PIOUS/RSSU or code 49 for RSIU/RSIS.
- ☐ A serial cable must be installed between the PIOU/PIOUS/RSSU/RSIU card and the Strategy. Toshiba's PPTC-9 (with six-conductor line cord) is recommended.
- ☐ Strategy's serial Port 1 is reserved for SMDI communication.

# 7

## Want to synch. Strategy system time with Strata DK?

*You'll need an LCD telephone physically installed on the first port of the Strata DK's PDKU card (see Step 5) card. It is important that the phone's LCD always displays the system time. For this to happen, no other LCD features, including MW Indication, can be enabled on this phone.*

- ☐ You must configure the *ksu\_time* and *console\_slot\_id* parameters.
- ☐ The Strata DK uses a 24-hour system clock, but does not notate a.m./p.m. on the LCD display. Because of this, during the initial installation or when the system has been shut down for any extended time, it is necessary to program the correct date and time in the Strategy Main Menu, Date/Time function or via Admin mailbox.

# 8

## All set? Just a few more things...

- ☐ Be sure to change the default password of the Shutdown Mailbox User ID 983 (see [page 40](#) in the *Strategy IVP8* or *Strategy DK Installation Guide*).
- ☐ Don't forget to wear the **anti-static wrist strap** during handling.
- ☐ When using an internal modem in the Strategy Admin PC, remember that Strategy Admin **does not** work with COM 3 or 4. Do not write over the Strategy Admin subdirectory on your remote PC when installing the newer version of Strategy Admin. Always retain previous versions of Admin.
- ☐ Make sure your *Strata I&M/Programming Manuals* and *Strategy I&M Manuals* are handy. **Be sure to read the entire Strategy IVP8 or Strategy DK Installation Guide before installing.**
- ☐ Remember to back up your database after installation.

*If you have read and completed this checklist, installation will be a breeze!*

**OK, let's get started!**



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# Introduction

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This Installation Guide introduces you to the Strategy IVP8 Voice Processing System and serves as a supplement to the *Strategy I&M Manual*. All information concerning the Strategy IVP8 is contained in this document. Applicable references can be found in the *Strategy I&M Manual*.

## Organization

- **Chapter 1 – The Grand Tour** gives you a general description of the Strategy IVP8’s capabilities and basic operations. Features exclusive to the Strategy IVP8 are described in detail.
- **Chapter 2 – Installation** contains vital information on how to install the Strategy IVP8, load and configure Strategy Admin software, and access and configure Strategy IVP8 software.
- **Chapter 3 – Maintenance** provides instructions on how to use the Tool Utility for backing up, restoring, upgrading software, and performing filecopies. Also describes the Strategy IVP8’s trace diagnostics.
- **Index**

## Conventions

This manual uses these conventions:

Conventions	Description
<b>Note</b>	Elaborates specific items or references other information. Within some tables, general notes apply to the entire table and numbered notes apply to specific items.
<b>Important!</b>	<i>Calls attention to important instructions or information.</i>
<b>CAUTION!</b>	<b>Advises you that hardware, software applications, or data could be damaged if the instructions are not followed closely.</b>
<b>WARNING!</b>	<b>Alerts you when the given task could cause personal injury or death.</b>
<b>Courier</b>	Shows a computer keyboard entry or screen display.
<b>Helvetica Bold</b>	represents tokens. For example: <b>M( )</b> .
<i>Italics</i>	represent parameter and menu/screen field names, and book titles. For example: <i>hot_box</i> parameter, <i>Extension</i> field.
“Type”	Indicates entry of a string of text.

Conventions	Description
“Press”	Indicates entry of a single key. For example: Type <b>prog</b> then press <b>Enter</b> .
Plus (+)	Shows a multiple PC keyboard or phone button entry. Entries without spaces between them show a simultaneous entry. Example: <b>Esc+Enter</b> . Entries with spaces between them show a sequential entry. Example: <b># + 5</b> .
Tilde (~)	Means “through.” Example: 350 ~ 640 Hz frequency range.
➤	Denotes the step in a one-step procedure.
➤	Denotes a procedure.
See Figure 10	Grey words within the printed text denote cross-references. In the electronic version of this document (Library CD-ROM or FYI Internet download), cross-references appear in blue hypertext.

## Related Documents/Media

**Note** Some documents listed here may appear in different versions on the CD-ROM, FYI, or in print. To find the most current version, check the version/date in the Publication Information on the back of the document’s title page.

You can find additional detailed information about Strategy in the following companion documents:

- **Strategy Voice Processing General Description** provides a system overview, available hardware, and features of the Strategy systems.
- **Strategy Installation and Maintenance Manual** provides installation and maintenance requirements and procedures for the Strategy system. Also includes System Administration forms and instructions on how to configure the system.
- **Strategy User Guide (Release 3.3)** provides the procedures necessary to operate the Strategy system. The Guide includes a tear-out (wallet-size) Quick Reference Guide and a quick reference map (flowchart) outlining Strategy’s features and operation.
- **Quick Reference Guide (Release 3)** provides a quick reference of frequently-used features.
- **Strategy Library CD-ROM** contains a copy of all Strategy documentation and enables you to view, print, navigate and search publications.
- **Strategy Advisor (CD-ROM)** is an end-user tutorial available on CD-ROM (covers all R3 or higher Strategy systems). The tutorial can be used as a training tool for the new user or as a refresher course for the Strategy user who wants to learn more about the system or the new features.

For authorized users, Internet site FYI (<http://fyi.tsd.toshiba.com>) contains all current Strategy documentation and enables you to view, print, and download current publications.

The Strategy IVP8 voice processing circuit card (shown at right) supports up to eight ports, and installs in selected card slots of a Strata CTX or Strata DK Base or Expansion Cabinet/Key Service Unit (KSU).

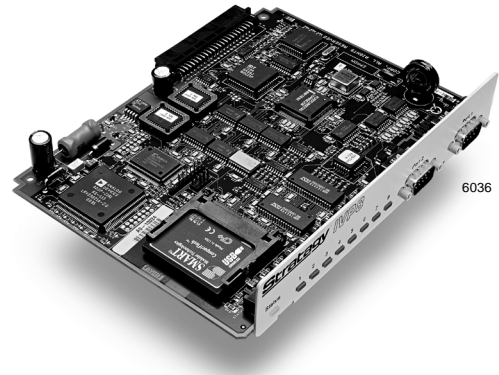
Each Strategy IVP8 has been preprogrammed at the factory for out-of-box (plug-and-play) operation on the Strata CTX. This includes the KSU integration and configuration parameters, default station (extension number) User ID mailboxes, and company greeting and instructions.

The supported systems and recommended software versions are:

- Strata CTX100/CTX670 — all releases
- Strata DK40i/DK40/DK16e/DK16 — all releases
- Strata DK424i/DK424/DK280 — all releases
- Strata DK24/DK56/DK96 — Release 4

The Strategy IVP8 requires Strategy Admin software, installed on a separate IBM-compatible Strategy Admin PC, for local or remote administration and maintenance.

Voice mail integration is provided by Strata CTX or Strata DK in-band (DTMF) integration. Strata CTX, DK424i, DK424 and DK280 can also provide integration using the Simplified Message Desk Interface (SMDI) output of the BSIS, PIOU, PIOUS, RSSU, RSIU, or RSIS SMDI port.



## Hardware

The Strategy IVP8 consists of a flash drive with approximately four hours of storage, an internal modem, a status light, and eight voice ports with corresponding voice port status lights (see [Figure 1](#)).

The Strategy IVP8's two serial ports are allocated as follows: Serial Port 1 is reserved for SMDI and Port 2 for the Strategy Admin PC connection.

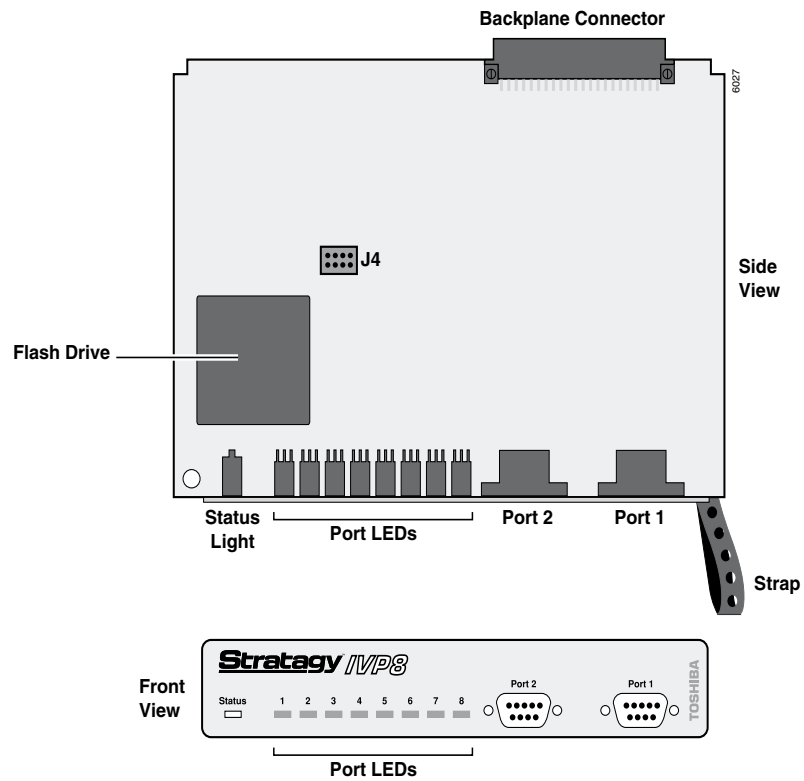


Figure 1 Strategy IVP8 Hardware Components

## Internal Modem

The Strategy IVP8 has an internal (soft) modem that operates at up to 2400 baud and can be used for remote maintenance.

## Status Light

The status light indicates the state of the Strategy IVP8:

Status LED																	
At boot-up:																	
Off	No power																
Blinking Amber	Power-on, self-test																
Red	Failed self-test. The port LEDs indicate which test(s) failed:																
	<table> <tr> <th>Port LED Green</th><th>Test Failed</th></tr> <tr> <td>1</td><td>DRAM</td></tr> <tr> <td>2</td><td>RTC</td></tr> <tr> <td>3</td><td>EEPROM</td></tr> <tr> <td>4</td><td>EPROM Checksum</td></tr> <tr> <td>5</td><td>Flash Drive</td></tr> <tr> <td>6</td><td>Integration Processor</td></tr> <tr> <td>7</td><td>DSP #1</td></tr> </table>	Port LED Green	Test Failed	1	DRAM	2	RTC	3	EEPROM	4	EPROM Checksum	5	Flash Drive	6	Integration Processor	7	DSP #1
Port LED Green	Test Failed																
1	DRAM																
2	RTC																
3	EEPROM																
4	EPROM Checksum																
5	Flash Drive																
6	Integration Processor																
7	DSP #1																
While system is operational:																	
Green	System is operational.																
Green with Blinking Amber	System is operational and hard drive is active.																

## Voice Port Status Lights

Each port has a status light labelled 1~8 on the front of the Strategy IVP8 unit that indicates the hookswitch and ring states of the port. The lights are On/Off based on the following:

Port LEDs	
Off	Port is on-hook and idle.
Green	Port is off-hook and in use.

## Software

The Strategy IVP8 requires Strategy Admin software, installed on a separate IBM-compatible computer, for local or remote administration and maintenance. Some basic administrative functions (e.g., adding User IDs, resetting passwords) can be performed by the System Administrator using a touchtone telephone (see the *System Administrator Guide* on the *Strategy Library CD-ROM* for details).

The Strategy Admin screens for Strategy IVP8 are identical to the standard Strategy screens with the exception of the Main Menu and the Users Menu Options screen.

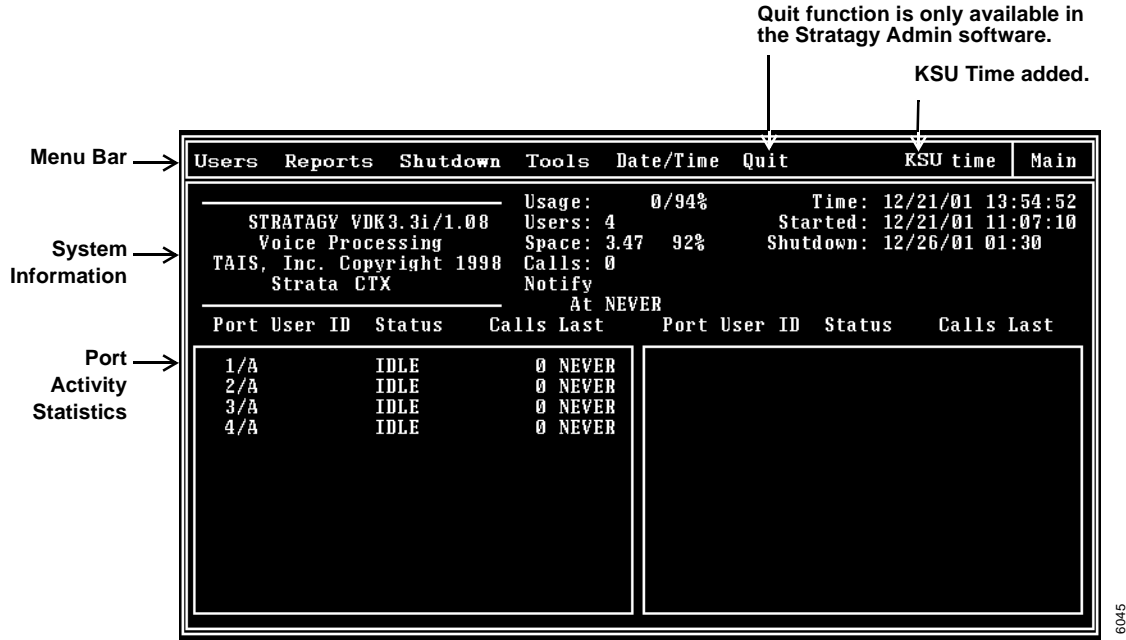
See Chapter 6 – Users Menu, Chapter 7 – Auto (Scheduling) Menu and Chapter 8 – Notify Menu in the *Strategy R3 I&M Manual* for complete details on using the screens.



## Main Menu

The Strategy Admin Main Menu (shown below with sample data) differs from the standard Strategy Main Menu in only these ways:

- The Tools utility replaces the Filecopy option. The Filecopy option is available from the Tools menu.
- A Quit function is added.
- KSU time displays when this feature is enabled or the Strategy IVP8's own system time (standard, daylight savings) when it is disabled.



For a description of the Tools options, see [“Configure Strategy IVP8”](#) on page 21 and [“Tools”](#) on page 32. For a procedure on configuring the KSU time feature, see [“Strategy IVP8 System Time”](#) on page 27. For a complete description of the standard Main Menu selections, see the *Strategy R3 I&M Manual*.

### Quit

**Important!** *This function quits the Strategy Admin program and **does not** shut down the Strategy IVP8.*

- Press **Alt+Q**. The remote PC exits Admin and returns to the DOS® prompt.

## Users Menu – Options Screen

You should note the differences between the Strategy IVP8's User Menu – Options screen (shown below with sample data) and the Options screen supported by the other Strategy systems:

- The *DSS Port* field replaces the Alternate Rate feature that is not available with the Strategy IVP8. See “DSS Port” on [page 5](#) for details.
- The *Message Volume* feature, although displayed on the screen, is not supported by the Strategy IVP8.

Menu Bar →

User's Information →

Basic Options →

Message Volume field (not supported) →

AMIS Options →

3436

Alternate Rate field is replaced by DSS Port field on Strategy IVP8.

## DSS Port

**Important!** *If the `dss_active` parameter in the `install.cfg` file is set to false, this field is disabled.*

The *DSS Port* field is indicative of the button position of a DSS console with default programming. Simply put, the Strategy IVP8 assumes that the programming of the DSS console is fixed and cannot be changed. The Strategy IVP8 always identifies key 01 of the DSS console as port 000. So if a port other than 000 is programmed under key 01, the *DSS Port* field for that corresponding mailbox is “000.”

### Example

Let's say that a programmer has changed key 01 in Program 29 (Strata DK424i/DK424) to provide BLF indication for port 023, and the extension associated for that port, which by default is extension 223, has a corresponding mailbox in the Strategy IVP8. If the Strategy IVP8 is expected to monitor busy activity for this extension, the *DSS Port* setting for Mailbox 223 would be “023.”

Possible values: 0~57, -1 disables feature

Default: -1

**Important!** *Once the DSS/Busy Lamp feature has been programmed using the `console_slot_id` and `dss_active` parameters and the *DSS Port* field, Strategy IVP8 must be re-started two times. The first re-start configures the DSS parameters/field. The second re-start “loads” the DSS parameters/field into active memory.*

## AMIS Networking

As more advanced features have been added to the DOS®-based Stratagy systems, memory management has become a critical issue in software development. Because of this, TAIS/TSD looks toward feature interaction as a way to create more operating system memory when developing new features. With the addition of the Call Record feature to the DOS-based products with Release 3.3 software, the number of default Audio Messaging Interchange Specification (AMIS) networking nodes has been reduced to 200. In addition, further restriction to the number of AMIS networking nodes will be required to support Stratagy DK systems with multi-lingual prompts.

The fewer AMIS nodes the system is configured for, the more operating system memory is available for other features. The Stratagy systems reserve enough operating system memory to run the number of AMIS nodes specified in the *amis\_max\_nodes* parameter in the Stratagy System Configuration. Additionally, a system using more features and a higher configuration requires more operating system memory. For example, an eight port Stratagy DK system with a high amount of call traffic using the new Call Record feature requires more operating system memory than a system with fewer ports and/or less traffic. Multi-lingual prompts have been specifically identified as a feature that requires a reduction in the number of AMIS nodes to increase Operating System (OS) memory for proper system operation.

Due to the number of feature configurations possible in a Stratagy system, it is not possible for TAIS/TSD to accurately identify the correct number of AMIS nodes in each case. If the system you are working on runs out of OS memory, the failure causes the system to continually reboot. To correct this, the number of AMIS nodes must be reduced.

# Exclusive Strategy IVP8/Strategy DK Features

## Parameters

Because of the unique nature of the interaction process between the Strategy IVP8 and Strata CTX or Strata DK, three parameters are used exclusively with the Strategy IVP8 (see [Table 3](#) on [page 25](#) for the definitions and settings for these parameters).

- *console\_slot\_id* – identifies the PDKU slot. Strategy IVP8 monitors the Direct Station Select (DSS) for Busy Station Identification.
- *dss\_active* – tells the Strategy IVP8 to retrieve Busy Lamp Field (BLF) busy station information for the assigned *DSS Port* field located on the Users Menu – Options screen (see [Step 12: “Program the Mailboxes”](#) on [page 27](#) for information on programming the field).
- *ksu\_time* – synchronizes Strategy IVP8’s system clock with the system clock of the supporting Strata CTX/Strata DK telephone system. Use of this feature with the Strata CTX requires SMDI integration.

## Tokens

As with all Strategy systems, the Strategy IVP8 retains all of the robust application programming that is provided by tokens. There are two tokens supported only by the Strategy IVP8. These are:

- **KM** – Enables a Strategy Admin PC’s modem to communicate with the Strategy IVP8 internal modem (2400 baud). This token is factory programmed in User ID 993.
- **KT( )** – Directs calls to a designated User ID when:
  - DSS function is active (*dss\_active* = true)
  - Assigned in the “answering” mailbox
  - Night Transfer on the DSS console is On.

## Busy Station Identification

The Busy Station Identification feature enables the Strategy IVP8 to determine if a station is “busy” without performing a “hookflash” and transfer. Strategy IVP8 “reads” the data of a DSS console and knows instantly if the station is busy or in Do Not Disturb (DND).

A station in DND mode signals a “busy” condition to a DSS console. DND and busy are processed the same way by the Strategy IVP8 (i.e., the Busy chain is executed).

See [“Busy Station Identification”](#) on [page 27](#) and [“DSS/Busy Lamp Feature \(For all Strata DK systems\)”](#) on [page 13](#) for details.

## Strategy System Time

The Main Menu screen displays KSU time when this feature is enabled or the Strategy IVP8’s own system time (standard, daylight savings) when it is disabled.

See [“Strategy IVP8 System Time”](#) on [page 27](#) for details.

## Night Transfer Alternate Routing

Using the **KT( )** token, a feature called Night Transfer Alternate Routing is available. The feature monitors the DSS Night Transfer key in order to activate the **KT( )** token for alternate routing applications.

See [“Night Transfer Alternate Routing”](#) on [page 28](#) for details.

## **The Grand Tour**

*Exclusive Stratagy IVP8/Stratagy DK Features*

Before starting the installation, read through these instructions thoroughly. Important information is included in this guide that is crucial to a successful installation.

## Step 1: Unpack and Inspect Stratagy IVP8

1. When you receive the system, examine all packages carefully and note any visible damage. If you find any damage, do not open the packages. Contact the delivery carrier immediately and make the proper claims.
2. Check the items contained in the packages against the packing list. In addition to the hardware components, you should receive an anti-static wrist strap, a caution sticker and a documentation package with the Stratagy IVP8.
3. Inspect all equipment for damage. If equipment is missing or damaged, contact your supplier immediately.
4. Remove any shipping tape and packing material used to protect the system during shipment. Retain the packing materials for re-use when transporting system hardware.

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### CAUTION!

**You will be handling the Stratagy IVP8 when it is most fragile — unpacked and exposed. The Stratagy IVP8, if handled properly, will give long, reliable service. To ensure that the unit is not damaged during installation or maintenance, follow these precautions.**

**Damage may not always be immediately evident (e.g., no physical damage on the outside of the unit) and system failure may result weeks or months later.**

- ***Handle the Stratagy IVP8 with care.*** Mechanical shock from dropping, shaking, excessive force when seating the board into the slot, rocking a connector on or other activities can severely damage the disk assembly or the disk's printed circuit board.
  - ***Wear the anti-static wrist strap*** included in the package. It can also be re-used and left with the Strata CTX or Strata DK cabinet. An electrostatic charge from your body can damage the drive or circuitry permanently.
  - ***Hold the Stratagy IVP8 by the edges or the strap*** and never touch the board's surface. Pressure on the printed circuit board or contaminants from your hands (e.g., skin oil, food particles, hand lotion) can cause component failure.
-

## Step 2: Program Strata

### Strata CTX Systems

To the Strata CTX processor, the Strategy IVP8 functions as an analog card (RSTU). Although there are some special program settings required for the Strategy IVP8 (e.g., DSS/BLF feature), the Strata CTX should be programmed just as it would for any external voice mail system that is to be connected to it.

**Important!** *The Strata CTX may need to be reset to initialize some Strata programming assignments. It is important that you make all such assignments **before** installing the Strategy IVP8.*

1. Strategy is compatible with all Strata CTXs. Strata CTX needs to recognize Strategy's DTMF signaling. An ARCS card must be installed in the Strata CTX100 for this DTMF signaling. Strata CTX670 allows four DTMF circuits in its default configuration.
    - Install and program an ARCS card in the Strata CTX100. When installed, the ARCS card by default allows four circuits. Additional licenses may be required, depending upon the Strata CTX configuration and applications.
    - Program slot in Strata CTX **before** installing the Strategy. Refer to *Strata CTX Programming Manual* for details.
  2. Do you want to activate the DSS/Busy Lamp feature? PDKU/BDKU cards must be installed that is programmed for a DSS Console.
    - Install and program the PDKU/BDKU in the Strata CTX.
    - Refer to the *Strata CTX Programming Manual* for DSS programming.
- Note** See “[Busy Station Identification](#)” on [page 27](#) for required settings on Strategy IVP8.
3. Are you going to have SMDI? SMDI is required for the Call Record feature with Strategy Release 3.3/IVP8. A BSIS card must be located close to the Strategy.
    - Install and program serial card BSIS in the Strata CTX. Refer to the *Strata CTX Programming Manual*.
    - A serial cable must be installed between the BSIS card and the Strategy. Toshiba's PPTC-9 (with six-conductor line-cord) is recommended.
    - Strategy's serial Port 1 is reserved for SMDI communication.



## Strata DK Systems

**Note** The following instructions are based on the Strategy IVP8 being installed in a pre-existing Strata DK. If the Strata DK is a new installation, see First-time Programming in Chapter 1 – Overview of the *Strata DK Programming Manual* for more information.

To the Strata DK processor, the Strategy IVP8 functions as an analog card (RSTU). Although there are some special program settings required for the Strategy IVP8 (e.g., DSS/BLF feature), the Strata DK should be programmed just as it would for any external voice mail system that is to be connected to it.

**Important!** *The Strata DK may need to be reset to initialize some Strata programming assignments. It is important that you make all such assignments **before** installing the Strategy IVP8.*

1. Using Program 03–Flexible PCB Slot Assignments set/verify the following slot assignments:

- Set code 31 for the slot where Strategy IVP8 is installed (see [Step 4: “Install Strategy IVP8”](#) on [page 12](#)).
- Enable the Strata DK to receive DTMF signalling from the Strategy IVP8:
  - For DK424i/DK424/DK280: Set codes 92, 93, or 94 for slot 00 for the RRCS installed on the RCTU.
  - For DK40i/DK40/DK16e/DK16: Set code 92 for slot 00 for the K5RCU, K5RCU2, or K4RCU3.
  - For DK24, DK56, DK96: Set codes 92 and 93 for CRCU.
- Set code 64 for the slot where the PDKU resides. Strategy IVP8 monitors this slot for the DSS/Busy Lamp feature (see [“Busy Station Identification”](#) on [page 7](#)).

**Note** For DK40/DK16e/DK16: slot 11 in the Base Cabinet must be set for code 64.

- If SMDI is desired with the Strata DK424i/DK424/DK280: Set PIOU/PIOUS/RSSU for code 43 or RSIU/RSIS for code 49 to enable the SMDI port (see Program 76 if installing RSIU or RSIS SMDI port).

2. Program the Strata DK system for voice mail integration. See the *Strata DK Programming Manual* for details.

## Step 3: Shut Down Strata CTX/Strata DK

- Turn off the main power switch to the Strata CTX/Strata DK system.

## Step 4: Install Strategy IVP8

### Strata CTX Systems

**CAUTION!** See cautions under [Step 1](#) on [page 9](#) before proceeding.

1. Locate the proper slot for the Strategy IVP8. (IVP8 can be installed in any Strata CTX slot.)
2. Insert the card into the appropriate slot, and apply firm, even pressure to ensure proper mating of connectors (CTX100 shown at right).



**CAUTION!** Do not hit the board for proper seating. This can damage the Strategy IVP8 components.

### Strata DK Systems

**CAUTION!** See cautions under [Step 1](#) on [page 9](#) before proceeding.

1. Locate the proper slot for the Strategy IVP8 (see [Table 1](#)).
2. Insert the card into the appropriate slot, and apply firm, even pressure to ensure proper mating of connectors (shown at right).



**CAUTION!** Do not hit the board for proper seating. This can damage the Strategy IVP8 components.

Table 1 Strategy IVP8 Slot Assignments

DK424i/DK424	
<b>Note</b>	For the DSS/BLF feature, the Strategy IVP8 must reside in a higher-numbered slot than the PDKU card that the Strategy IVP8 monitors (see <a href="#">Figure 2</a> on <a href="#">page 14</a> ).
	Install the card in a universal slot starting with slot 12 (if a PDKU or PEKU is in slot 11) or slot 13 (if a RSIU is in slot 11).
<b>Important!</b>	<i>Do not install the Strategy IVP8 in slots 27, 28, 31, 37, 38, 47, 48, 51, 57, 58, 67, 68, 71, 77, or 78.</i>
	To enable end-to-end signaling, ensure that an RRCS -4, -8 or -12 is installed on the RCTU, and verify that the RCTU code in Program 03 is for RRCS operation.
DK280	
<b>Important!</b>	<i>The Strategy IVP8 does not function when installed in slots 31 or 51.</i>
<b>Note</b>	For the DSS/BLF feature, the Strategy IVP8 must reside in a higher-numbered slot than the PDKU card that the Strategy IVP8 monitors (see <a href="#">Figure 2</a> on <a href="#">page 14</a> ).
	DK280 (R2) — install the card in any universal slot (except slots 31 and 51), starting with slot 12 of the Base Cabinet.
	DK280 (R3 or higher) — install the card in any universal slot (except slots 31 and 51), starting with slot 12 (if a PDKU or PEKU is in slot 11) or slot 13 (if a RSIU is in slot 11).
	DK280 (All releases) — To enable end-to-end signaling, an RRCS -4, -8 or -12 must be installed on the RCTU. Verify that the RCTU code in Program 03 is for RRCS operation.
DK40i/DK40/DK16e/DK16	
	Install the Strategy IVP8 in any slot in the Expansion KSU where an eight-port card can be inserted. For DK40i/DK40/DK16e, see Chapter 2 – DK40i Configuration in the <i>Strata DK I&amp;M Manual</i> for all possible configurations.
<b>Important!</b>	<i>Do not install Strategy IVP8 in slot 18 of the DK40i/DK40/DK16e.</i>
<b>DK40i/DK40/DK16e/DK16:</b>	A K5RCU, K5RCU2, or K4RCU3 must be installed in the Base KSU to enable end-to-end signaling.
<b>Note</b>	Putting a Strategy IVP8 into a Strata DK40i/DK40/DK16e/DK16, eliminates eight telephone lines.
DK24, DK56, DK96	
	Install the card in any slot after slot 01. A CRCU must be installed to enable end-to-end signaling.
DSS/Busy Lamp Feature (For all Strata DK systems)	
	For the DSS/Busy Lamp feature to operate, the Strategy IVP8 must monitor the DSS/BLF data from a specific PDKU card. The Strata DK telephone system restricts this capability to certain configurations. The Strategy IVP8:
	<ul style="list-style-type: none"> <li>• Cannot be installed in the first slot of any cabinet (i.e., 11~71).</li> <li>• Can only monitor a PDKU that resides in an odd-numbered cabinet.</li> <li>• Must always be in a higher-numbered slot than the PDKU card, even if the PDKU is in another cabinet.</li> </ul>
	When Strategy IVP8 is installed in an odd-numbered cabinet, the system software searches for the PDKU in all lower-numbered card slots in that cabinet (as defined by the <i>console_slot_id</i> parameter on <a href="#">page 25</a> ). When the Strategy IVP8 is installed in an even-numbered cabinet, the system software searches for the PDKU in all lower-numbered card slots of the preceding odd-numbered cabinet. see <a href="#">Figure 2</a> on <a href="#">page 14</a> for examples.

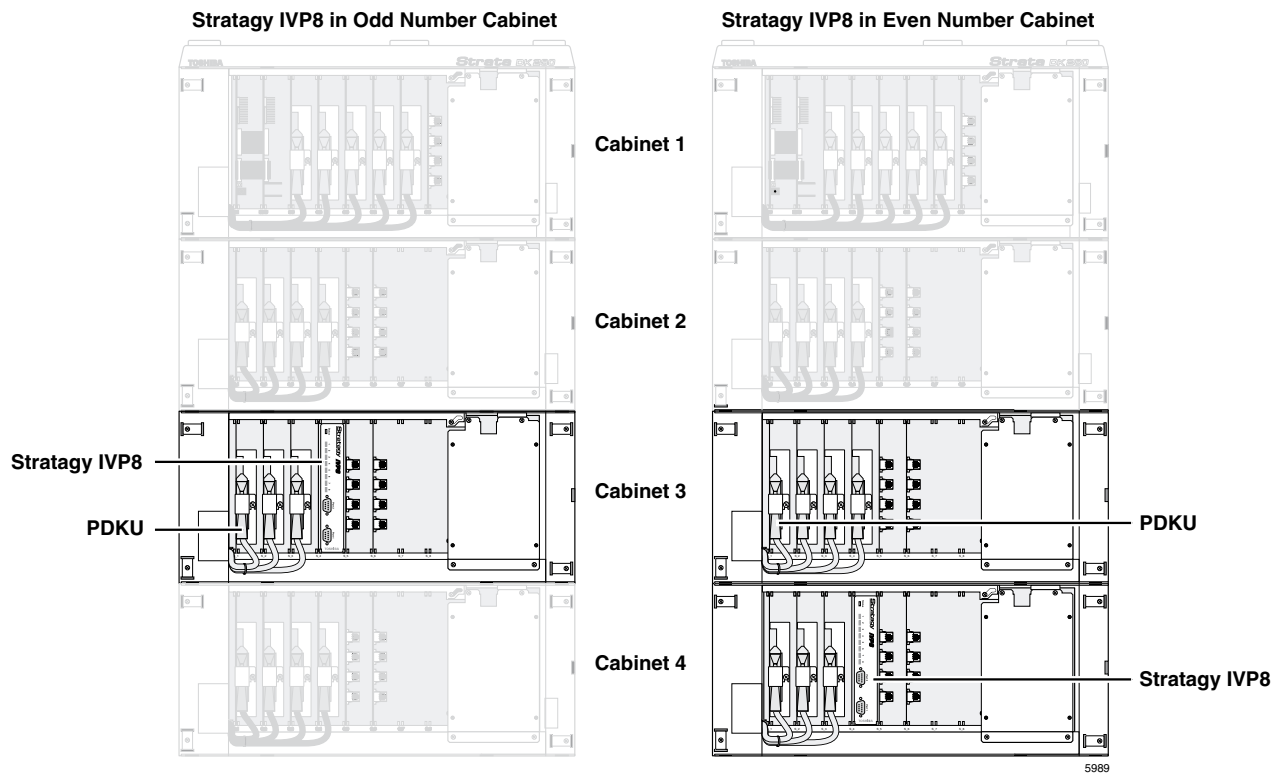


Figure 2 Strata DK424i/DK424/DK280 PDKU DSS/Busy Lamp Field Slot Assignment Examples (console\_slot\_id configured as 0)

## Step 5: Restart Strata CTX/Strata DK and Verify Strategy IVP8 is Functioning Properly

**Note** Each Strategy IVP8 has been preprogrammed at the factory for out-of-box (plug-and-play) operation on the Strata CTX and Strata DK424i. This includes the integration and configuration parameters, default station (extension number) User ID mailboxes, and company greeting and instructions.

- Turn on the main power switch to the Strata CTX or Strata DK system. The Strategy IVP8 performs a self test while booting-up. Let it proceed without any action from you.

During this process the status light is blinking amber and should turn solid green when finished (see [Figure 1](#) and “[Status Light](#)” on [page 3](#)). The process should take approximately four to five minutes.

## Step 6: Verify that Voice Playback, Basic Auto Attendant and Ports are Functioning Correctly

- Dial the extension number for each port. Strategy IVP8 should (for each port):
  - Answer and play the Toshiba Plug and Play company greeting (“Thank you for calling...”), greeting 1 in User ID mailbox 990.
  - Continue to play the Toshiba Plug and Play caller instructions greeting (“If you know the extension of the person you wish to reach...”), greeting 1 in User ID mailbox 991.

## Step 7: Install Strategy Admin Software (VSA.3x)

**Important!** *Strategy Admin Release 3 software is only supported by the Strategy IVP8, Strategy Flash and the Strategy DK Release 3 and cannot be used with other Release 2 systems.*

**Note** Loading the Strategy Admin software can be done before/after connecting the Strategy Admin PC to the Strategy IVP8.

The Strategy Admin PC, connected to the Strategy IVP8 (see [Step 8 on page 16](#)), must meet the following specifications:

- IBM-compatible
- 3.5" 1.44 (high-density) floppy-disk drive
- Hard drive with a minimum of 5MB of available disk space
- 580KB RAM free memory

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**CAUTION!** Do not install the Strategy Admin VSA.3x software into an existing Admin2 or Admin3 directory used for Release 2 systems. If you do, file corruption can occur when communicating with a Strategy IVP8.

---

### ► To install Strategy Admin Software

1. Insert the Strategy Admin disk into the floppy disk drive of the Strategy Admin PC.
2. Access the DOS prompt (C:\).
3. To begin the installation procedure, type  
`a:install c:\admin3x`  
where: x = the version letter of the Admin software you are installing.

**Note** It is recommended that you not overwrite the current Strategy Admin directory but create a new directory.

4. Press any key to continue. The Strategy Admin program is installed on drive C: in subdirectory **ADMIN3x**.

## Step 8: Connect Strategy Admin PC to Strategy IVP8

Communication between the Strategy Admin PC and the Strategy IVP8 is accomplished by one of two methods: local or remote.

Strategy IVP8 uses the serial Port 2 by default to communicate with the Strategy Admin PC (see [Figure 1](#)). This setting can be changed using the *admin\_port* parameter in the Strategy System Configuration file (see [Table 3](#) on [page 25](#) for detailed information).

### Local Connection

- Using a null-modem cable, connect the Strategy Admin PC to the Strategy IVP8. A prefabricated cable (SG-ADM CBL), designed expressly for Strategy Admin communication with the Strategy IVP8, Strategy DK and Strategy Flash is available from Toshiba.

**Note** If you wish to purchase individual cabling/connectors/adapters in lieu of purchasing the Toshiba Strategy Admin cable, we have provided the wiring diagrams (see [Figures 3](#) and [4](#)).

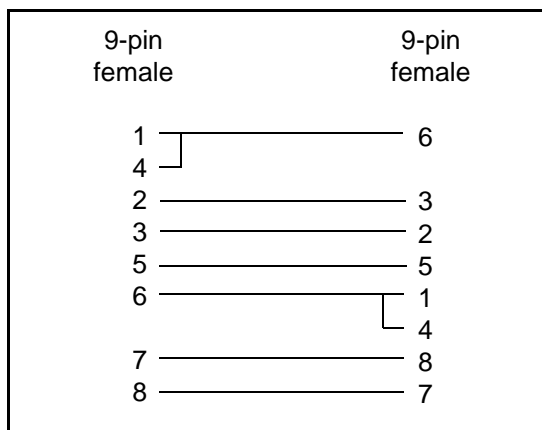


Figure 3 RS-232 DB9 to DB9 Cabling

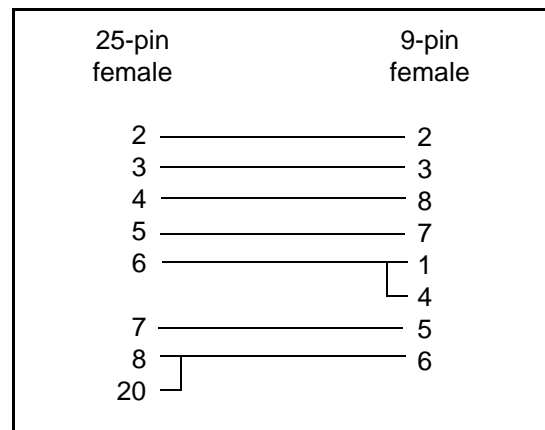


Figure 4 RS-232 DB25 to DB9 Cabling

## Remote Connection

Remote communication with the Strategy IVP8 requires the installation of a modem on the Strategy Admin PC (if a modem does not already exist). The Strategy IVP8 comes equipped with an internal modem of 2400 baud and does not require any additional equipment. A 9600 baud external modem can also be used for remote connection with the Strategy IVP8.

### Strategy Admin PC Modem

- Prepare the Strategy Admin PC by installing, connecting and configuring a modem. The modem must be capable of communicating at a minimum of 9600 baud.

---

**CAUTION!** Internal modems configured for COM ports 3 or 4 are not supported by Strategy Admin software.

---

### Strategy IVP8 Modem

The Strategy IVP8 can communicate through either an internal or external modem.

#### Internal

The Strategy IVP8 has an internal modem that communicates at up to 2400 baud. No additional equipment is necessary. (See **KM** token in [Step 13: “Program the Applications”](#) on [page 27](#) for programming information.)

#### External

An external modem can be installed on the Strategy IVP8 for a communication speed of 9600 baud. If use of an external modem is desired, use the following installation procedure.

#### ➤ To install an external modem

1. Equip the Strategy IVP8 with a Hayes-compatible 14.4KB V32.bis modem. Toshiba's fax/modem (SG-FMOD) has been tested for consistent operation and is recommended. Use of other modem models cannot be guaranteed for trouble-free operation.

**Note** The default setting configured for the Strategy IVP8 remote access is serial port 2 (see [Figure 1](#)). Both local and remote access use the same designated serial port on the Strategy IVP8.

2. Connect a telephone line to the modem. Use either a station connected to the telephone system or a dedicated Central Office (CO) line.



## Step 9: Configure Strategy Admin Software

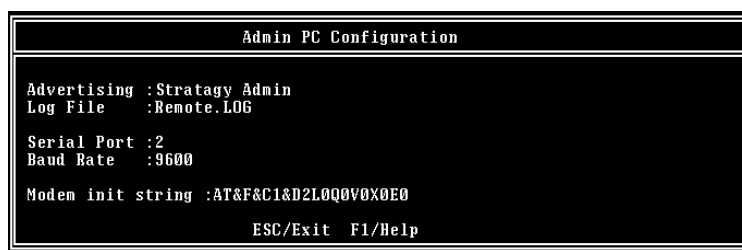
Settings for the communication port in Strategy Admin must match the corresponding parameters set in the Strategy System Configuration file on the Strategy IVP8.

For example, the Strategy Admin PC serial port settings made in the *Serial Port* field of this procedure must be identical to the serial port definitions (i.e., *set serial\_port*) set in the Strategy IVP8's System Configuration file (see [“Strategy System Configuration”](#) on [page 24](#)).

**Note** The menu screens detailed in this section are only available with Strategy Admin version VSA.2G or later.

### ► To configure Strategy Admin software

1. From the **C:\ADMIN3** DOS prompt, type **admin** and press **Enter**. The Strategy Admin screen displays.
2. From the Strategy Admin Main screen, press **2** or highlight the Configure Admin option and press **Enter**. The Admin PC Configuration screen displays (shown right).



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**Note** Press **F1** for help with any settings in the

Strategy Admin Configuration screen.

3. Make any changes needed. See [Table 2](#) on [page 19](#) for a description of each of the fields.

**Note** Press **F2** in the *Serial Port* and *Baud Rate* fields to display a pop-up box with valid entries.

4. To save your changes, you must have the cursor in the last field (i.e., Modem Init String), and press **Enter** or the arrow down (↓) key

...or to exit without saving your changes, press **Esc** at any time.

The program returns to the Strategy Admin Main screen.

Table 2 Stratagy Admin PC Configuration Fields

Field	Description/Default
<b>Advertising</b>	Advertising string that displays when the Main Menu screen blanks after a specified number of minutes of inactivity (per <i>tmo_blank</i> parameter in the install.cfg file). Possible values: 60-character string. The single quotes are required. Default: 'Stratagy ADMIN'
<b>Log File</b>	System log file name. This log file contains connection information, any execution error information, and file copy actions. <b>Note</b> It is a good idea to periodically archive or delete this file once or twice a year, whenever you perform preventive maintenance. Possible values: Eight-character file name, plus three-character extension. The single quotes are required. Default: 'Remote.LOG'
<b>Serial Port</b>	Port number Possible values: 1~2 Default: 2
<b>Baud Rate</b>	Baud rate of serial port. Possible values: 1200, 2400, 9600 Default: 9600
<b>Modem Init String</b>	Sets modem initialization string. The modem initialization string can be changed to work with specific brand modems. Refer to the user's manual for your individual modem for the initialization string. <b>Note</b> The protocol used by Stratagy Admin does not support error correction, data compression, or auto baud rate adjustment. If problems are encountered connecting remotely, turn these parameters off on the Stratagy Admin PC modem. Refer to your modem user guide for instructions. Default: AT&F&C1&D2L0Q0V0X0E1 where: AT The command that tells the modem to come to Attention. &F Return to factory defaults. Instructs the modem to use the factory set parameters. &C1 Data Carrier Detect (DCD) signal. Set to on, it indicates presence of a data carrier. &D2 Data Terminal Ready selected. L0 Speaker volume. Off or low volume. Q0 Mode responses. Enables result codes to be issued to the screen. V0 Result code format. Numeric format. X0 Extended result codes. Disables monitoring of busy tones unless forced otherwise by country requirements. Sends only OK, connect, ring, no carrier, error and no answer result codes. E0 Command Character Echo. Disables echoing of the commands to the screen.

## Step 10: Access Strategy IVP8

Prior to accessing Strategy IVP8, verify that Strategy IVP8 is operational by making a test call into the system.

**Note** Menu screens detailed in this section are available only in Strategy Admin version VSA.2G or later.

1. From the DOS prompt (**C:\ADMIN3**), type: **admin** and press **Enter**. The Strategy Admin screen displays.

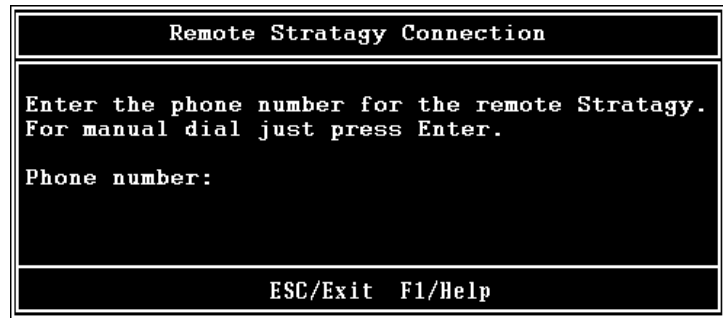
**Important!** *The Strategy Admin PC must be configured for the correct serial port in Strategy Admin prior to performing [Substep 2](#).*

2. Press **Enter**. The Strategy Admin software prompts for the Strategy IVP8's system password.
3. Type the password (the default is **Strategy**) and press **Enter**.

If a modem is not detected, Strategy Admin establishes a direct connection (local access) and a version of the standard Main Menu displays ("[Main Menu](#)" on [page 4](#)). Proceed to [Step 11: "Configure Strategy IVP8"](#) on [page 21](#).

If a modem is detected, Strategy IVP8 displays the screen shown at right:

Proceed to "[Remote Access](#)" on [page 20](#) for instructions on accessing the Strategy IVP8 remotely.



### Remote Access

Strategy Admin software version VSA.3x has two modes of accessing the Strategy IVP8 remotely:

- Direct Dialing Mode — the Strategy IVP8 modem has a dedicated telephone line, enabling you to dial into the number directly.
- Manual Dialing Mode — the Strategy IVP8 modem does not have a dedicated telephone line and an operator must transfer the call to the modem number.

**Note** Manual dialing requires a standard telephone be connected to the Strategy Admin PC modem.

Earlier versions of the Strategy Admin software permit only the direct dialing mode.

### Direct Dialing Mode

- Type the telephone number (50 digits maximum). Do not use dashes (e.g., 9,7678989). Press **Enter**.

Once the connection is made to the Strategy IVP8 modem, a carrier tone is heard. The Strategy Admin synchs up to the modem. A message reading **Connection established** appears briefly on the screen and the Main Menu displays. Proceed to [Step 11 "Configure Strategy IVP8"](#).

## Manual Dialing Mode

1. Press **Enter** to go to the Manual Dialing Mode screen.
2. Go off-hook on the standard telephone and dial the telephone number. Once connection is made to the Strategy IVP8 external modem, a carrier tone is heard.
3. Press **Enter**. Strategy Admin synchs up to the modem. A message reading **Connection established** appears briefly on the screen and the Main Menu displays.

# Step 11: Configure Strategy IVP8

**CAUTION!** After making any significant program changes to the Strategy IVP8, the system must be properly shutdown and restarted using “Shutdown and Restart Current Version” from the Shutdown menu. This procedure copies the most current database to the C:\Strategy\Archive\Good directory for use by the Automatic System Recovery feature (see “[Automatic System Recovery](#)” on page 42). If this procedure is not followed and the system loses power, loss of customer information will result.

To configure the Strategy IVP8, you may need to use the following menu selections available from the Tools option on the Main Menu:

- Toshiba Plug and Play
- Telephone System Configuration
- Strategy System Configuration

For a complete description of the standard menu selections and field descriptions, see “[Tools](#)” on page 32.

### ► To access Tools Option

1. Press **Alt+t**.
2. Type the password (the default password is **Strategy**) and press **Enter**. See “[Tools](#)” on page 32 for a description of the menu options.

## Toshiba Plug and Play

The Strategy IVP8 is pre-installed for the Strata DK processors. If you need to change this selection to a different Strata telephone system, change it now using this selection. Otherwise, go to “[Telephone System Configuration](#)” on page 22.

**Note** If you only want to change the PBX type, do not use this function. Instead, set the *pbx\_type* parameter in the Strategy System Configuration screen (see “[pbx\\_type](#)” on page 26 for details).

Selecting this function:

- Changes all the settings to the new Toshiba telephone system default values.
- Deletes any User ID mailbox customizations.
- Installs the Strategy IVP8 default mailboxes.

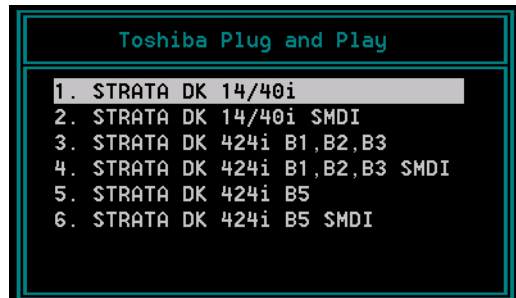
**Note** Existing messages and mailbox greetings are not deleted when Plug and Play is selected. For example, if Mailbox 200 has messages and greetings and Toshiba Plug and Play for Strata CTX is run, then Mailbox 200 retains the messages and greetings from the previous database.

## Change Toshiba Plug and Play Option

1. From the Tools menu, press 5.
2. From the Toshiba Plug and Play screen, enter the number of the selection.

The Strategy IVP8 utility automatically defines the telephone system dial codes and tone patterns, system integration patterns and default mailboxes for the specific telephone system.

3. When the process is complete, press any key to reboot. The DOS prompt displays.
4. To continue, re-enter Strategy Admin. The Main Menu displays with the new telephone system designation.
5. Press **Alt+t** to access the Tools submenu.



## Telephone System Configuration

This function modifies the following codes/integration patterns:

- Telephone System Dial Codes – Strategy IVP8 performs certain actions on your telephone system by using defined telephone system dial codes. To define the dial codes, you must modify the telephone system dial code parameters.
- System Integration Patterns – Enables modification to the telephone system integration patterns.

**Note** The telephone system configuration is set using the *pbx\_type* parameter (see [“pbx\\_type”](#) on page 26 for details).

If your system is to be configured for system dial codes or system integration patterns, you should edit them now. As an example:

If your Toshiba telephone system is configured for tone first, you would:	
1.	Press 1 to Edit System Dial Codes.
2.	From the Telephone System Dial Codes screen, delete the suffix –1 from the line <b>What to dial AFTER dialing the User ID extension.</b>
3.	Press <b>Esc</b> .
4.	Press 2 to save your changes without restarting Strategy IVP8.

Otherwise, go to [“Strategy System Configuration”](#) on page 24.

## Modify Codes and Integration Patterns

1. From the Tools menu, press **4**. The Telephone System Configuration screen displays.
2. From the Telephone System Configuration screen, press **1**. The Telephone System Dial Codes screen displays (shown right).

```

1. Telephone System Dial Codes
# Dial code to put a caller on transfer hold : F-
# Dial code to use when there is no transfer dialtone: F-
# Dial code to return to caller after Ring No Answer : F-
# Dial code to return to caller when there is a Busy : F-
# Dial code to use after a call screening reject : F-
# Dial code to connect the caller to the extension : H
# Number of seconds to wait for dialtone detection : 4
# Number of 1/100 seconds to use for Flash time : 55
# Which DTMF tone to listen to for answer detection : a
# Which DTMF tone to listen to for hangup detection : d
# What to dial BEFORE dialing the User ID extension :
# What to dial AFTER dialing the User ID extension : 1-
# What to dial when the system first starts up :
# What to dial when the system performs a shutdown :
# What to dial when a port goes off-hook :
# The number of minimum ticks to define CPM silence : 6
# The number of minimum ticks to define CPM sound : 6
# Tone 1 to end recording : 400,20,620,25,11,-11,0,0,0
# Tone 2 to end recording : 400,20,0,25,2,25,2,2
# Pager services tone detect : 1400,70,0,0,10,-10,0,0,0
# Switch name to display on MAIN screen : 'Strata DK 14/40'

```

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...or 2. The System Integration Patterns screen displays (shown right).

```

3. System Integration Patterns
Integration Timeout by 1/10: 10
Forward from Ring No Answer: Brr
Forward from Ring No Answer: Brrr
Forward from Ring No Answer: Brrrr
Forward from Ring No Answer: 91rr
Forward from Ring No Answer: 91rrr
Forward from Ring No Answer: 91rrrr
Direct call from extension : 92ee
Direct call from extension : 92eee
Direct call from extension : 92eeeee
<available> :
<available> :
<available> :
<available> :
<available> :
<available> :
<available> :
<available> :
<available> :
<available> :
<available> :
<available> :

```

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3. After making the change(s), press **ESC**. The Telephone System Config screen displays.
4. From the Telephone System Config screen, press **1**. The changes are transmitted to Strategy IVP8 and Strategy IVP8 is shut down and restarted. By shutting down and restarting Strategy IVP8, the changes take effect.  
 ...or 2. The changes are transmitted to Strategy IVP8 but Strategy IVP8 is not shut down or restarted. Until you restart Strategy IVP8, the changes do not take effect.  
 ...or 3. The changes you made are cancelled and not saved.
5. If you pressed **1** to save the changes, press any key to reboot. The DOS prompt displays. To continue, you must re-enter Strategy Admin.

---

**CAUTION!** Take care when making changes and then restarting Stratagy IVP8. In some cases, if invalid information has been entered, Stratagy IVP8 may not reboot correctly. (See [“Automatic System Recovery”](#) on [page 42](#) for information on files created during an unsuccessful restart.)

---

## **SMDI Serial Integration**

SMDI integration is required to provide the capability to recognize Calling Party Identification (ANI) and for the KSU time feature. See *Stratagy R3 I&M Manual* for details.

## **Stratagy System Configuration**

Use this function to change Stratagy IVP8's system options and parameters, and define time-out values. Most Stratagy System Configuration options *do not* require modification.

We recommend that you modify the system password immediately. All other options have default values, but can be modified as required.

### **Configure Stratagy IVP8 Software**

1. From the Tools menu, press **6**. The system configuration file displays. The parameters are listed in alphabetical order.

**Note** Fax settings are not available to the Stratagy IVP8.

2. Make changes to the parameters. See [“System Configuration”](#) in [Chapter 3 – Configure Stratagy](#) of the *Stratagy R3 I&M Manual* for instructions on changing the parameters.
3. Press **ESC**.
4. From the Stratagy System Config screen, press **1**. The changes are transmitted to Stratagy IVP8 and Stratagy IVP8 is shut down and restarted. By shutting down and restarting Stratagy IVP8, the changes take effect.  
...or **2**. The changes are transmitted to Stratagy IVP8 but Stratagy IVP8 is not shut down or restarted. Until you restart Stratagy IVP8, the changes do not take effect.  
...or **3**. The changes you made are cancelled and not saved.
5. If you pressed **1** to save the changes, press any key to reboot. The DOS prompt displays. To continue, you must re-enter Stratagy Admin.



Table 3      Strategy IVP8 System Configuration Parameters – Definitions and Settings

Parameter	Description														
<b>accept_0_calling_id</b>	<p>Specifies whether Strategy should accept 0 as valid mailbox number. If the parameter is set to “false,” SMDI packets that include 0 for the “forwarding from station number” (forwarded call SMDI packets) or for the “calling station number” (direct call SMDI packet) are not accepted.</p> <p>Possible values: false (mailbox 0 not accepted), true (mailbox 0 accepted) Default: false</p>														
<b>admin_port</b>	<p>In order for Strategy IVP8 to communicate with the Strategy Admin PC connected to one of its serial ports, Strategy IVP8 needs to know which port is to be used. This parameter defines the logical port that Strategy IVP8 software uses.</p> <p>Example: Set this parameter to 1 for logical serial port 1.</p> <hr/> <p><b>CAUTION!</b> The connection may fail if the baud parameter for this port is set higher than 9600 or the serial port definitions for this port do not correspond to the definitions for the COM port being used on the Strategy Admin PC.</p> <hr/> <p>Possible values: 1 (COM1), 2 (COM2) Default: 2</p>														
<b>console_slot_id</b>	<p>Identifies to Strategy IVP8 the physical slot in the Strata DK that contains the PDKU programmed for DSS console in Program 03 (type 64). The Strategy IVP8 monitors this slot for the busy lamp field (see <i>dss_active</i> parameter), and Night Transfer.</p> <p><b>For Strata DK40i/DK40/DK16e/DK16 and DK24, DK56, and DK96:</b> the <i>console_slot_id</i> is always set to 0 (zero). Slot ID 0 corresponds to card slot S11 for DK40i/DK40/DK16e/DK16 or slot 01 for DK24, DK56, and DK96.</p> <hr/> <p><b>CAUTION!</b> For Strata DK16: If this parameter is set to 1, Strategy IVP8 is disabled. All ports return “ring no answer” when dialed.</p> <hr/> <p><b>For Strata CTX100/CTX670, DK424i/DK424 and DK280:</b> set this parameter per the following table.</p> <table> <tr> <th>CTX100/CTX670 DK424i/DK424/DK280 Slot Assignment</th><th>Console_slot_id</th></tr> <tr> <td>11, 31, 51</td><td>0</td></tr> <tr> <td>12, 32, 52</td><td>1</td></tr> <tr> <td>13, 33, 53</td><td>2</td></tr> <tr> <td>14, 34, 54</td><td>3</td></tr> <tr> <td>15, 35, 55</td><td>4</td></tr> <tr> <td>16, 36, 56</td><td>5</td></tr> </table> <p><b>Important!</b> For this feature to work, the PDKU must reside in an odd numbered cabinet (see <a href="#">Figure 2</a> on <a href="#">page 14</a> for examples).</p> <p><i>In all applications, the Strategy IVP8 must reside in a higher-numbered slot in the same cabinet or next even numbered cabinet as the PDKU card (defined as console_slot_id).</i></p> <p>Possible values: 0–5 Default: 0 (zero)</p>	CTX100/CTX670 DK424i/DK424/DK280 Slot Assignment	Console_slot_id	11, 31, 51	0	12, 32, 52	1	13, 33, 53	2	14, 34, 54	3	15, 35, 55	4	16, 36, 56	5
CTX100/CTX670 DK424i/DK424/DK280 Slot Assignment	Console_slot_id														
11, 31, 51	0														
12, 32, 52	1														
13, 33, 53	2														
14, 34, 54	3														
15, 35, 55	4														
16, 36, 56	5														

Table 3 Stratagy IVP8 System Configuration Parameters – Definitions and Settings (continued)

Parameter	Description
<b>dss_active</b>	<p>Stratagy IVP8 monitors the Busy Lamp Field (BLF) indicators on the Strata CTX/Strata DK's DSS console port to determine if an extension is busy before attempting to transfer. This parameter corresponds with the <i>DSS Port</i> field assignment in the Users Option Menu of a User ID.</p> <p>True: Stratagy IVP8 monitors the BLF indicators before attempting to transfer a call. False: Stratagy IVP8 does not monitor the BLF indicators.</p> <p><b>Important!</b> <i>If this parameter is set to false, the DSS Port field on the Users Option Menu is disabled.</i></p> <p>Possible values: true, false Default: false</p>
<b>ksu_time</b>	<p>Synchronizes Stratagy IVP8's system clock with the system clock of the supporting Strata CTX/Strata DK telephone system.</p> <p>Information obtained by Stratagy IVP8 from the Strata CTX/Strata DK system does not contain "second" time; therefore, there may be a 1–60 second difference between the Strata CTX/Strata DK system and the KSU time displayed on the main menu of the Stratagy Admin program.</p> <p><b>Important!</b> <i>The Stratagy IVP8 electronically monitors the clock information on the LCD of the defined PDKU port. If other LCD messages (e.g., message waiting callback information) appear over the system time, the Stratagy IVP8 is unable to consistently synch to the KSU time.</i></p> <p>True: Stratagy IVP8 synchronizes the Stratagy IVP8's system clock with the Strata CTX/Strata DK's system clock. The KSU time displays at the top right corner of the Main Menu. Setting this parameter to true, disables the <i>daylight_saving_time</i> parameter.</p> <p>False: Stratagy IVP8 does not use the Strata CTX/Strata DK's system clock.</p> <p><b>Important!</b></p> <ul style="list-style-type: none"> <li><i>The Strata DK uses a 24-hour system clock, but does not notate a.m./p.m. on the LCD display. Because of this, during the initial installation or when the system has been shut down for any extended time, it is necessary to program the correct date and time in the Stratagy IVP8 Main Menu, Date/Time function or via System Administrator's mailbox.</i></li> <li><i>This feature requires SMDI integration to work with the Strata CTX.</i></li> </ul> <p>Possible values: true, false Default: false</p>
<b>pbx_type</b>	<p>Defines the model of Strata CTX/Strata DK that is used as the host system.</p> <p>Possible values: DK8, DK16, DK16E, DK24, DK56, DK96, DK14/40, DK14/40S (DK24/40 with SMDI), DK280, DK280S (DK280 with SMDI), DK424i, DK424, DK424S (DK424 with SMDI) Default: DK424i/DK424</p>
<b>trace_cap</b>	<p>Defines the size of the TRACE.OUT file in kilobytes. When the size of the file reaches its defined maximum, new data begins to overwrite the oldest data in the file, generating a continuous loop of information.</p> <p>Possible values: Values vary depending on the amount of Trace information required and the space available on Stratagy IVP8's hard drive. If this value is set high, it could take an excessive amount of time to copy the file to the portable/desktop computer. A standard setting is 1440 for copying the file to the portable/desktop computer's floppy-disk drive.</p> <p>Default: 1000 (kilobytes = 1 megabyte)</p>

## Busy Station Identification

To use this feature you must configure the *console\_slot\_id* and *dss\_active* parameters, program the *DSS Port* field (see [Step 12: “Program the Mailboxes”](#) on page 27), and install/program a PDKU as the DSS console (see [“Busy Station Identification”](#) on page 7).

### ► To configure the feature in Strategy

1. Set the *dss\_active* parameter to TRUE.
2. Configure the *DSS Port* field on the User Menu – Options screen for each mailbox.

**Important!** *Once the DSS/Busy Lamp feature has been programmed using the two parameters and the DSS Port field, Strategy IVP8 must be restarted two times. The first restart configures the DSS parameters/field. The second restart “loads” the DSS parameters/field into active memory.*

## Strategy IVP8 System Time

Using the *ksu\_time* parameter, you can synchronize Strategy IVP8’s system clock with the system clock of the supporting Strata CTX/Strata DK telephone system. Setting this parameter to true, disables the *daylight\_saving\_time* parameter.

**Note** An LCD telephone must always be physically installed on the first port of the PDKU card in the Strata DK (defined in *console\_slot\_id* parameter). During installation, the Strategy IVP8’s system time must be reset prior to syching with the Strata CTX/Strata DK. See [“ksu\\_time”](#) on page 26 for details.

This feature requires SMDI integration to work with the Strata CTX.

## Step 12: Program the Mailboxes

- Program the User mailboxes for the customer’s application. See [“Software”](#) on page 3 for Strategy IVP8 special features on the Main Menu and Users Menu, Options screen. See [Chapter 6 – Users Menu](#), [Chapter 7 – Auto \(Scheduling\) Menu](#) and [Chapter 8 – Notify Menu](#) in the *Strategy R3 I&M Manual* for complete details on using the screens.

## Step 13: Program the Applications

**Note** See [Chapter 9 – Token Programming](#) in the *Strategy R3 I&M Manual* for complete details on all the Strategy tokens.

### Exclusive Strategy IVP8/Strategy DK Tokens

Tokens available exclusively for the Strategy IVP8/Strategy DK are:

- **KM** – Enables a Strategy Admin PC’s modem to communicate with the Strategy IVP8 internal modem (2400 baud). This token is factory programmed in User ID 993.

Example: @KM

- **KT( )** – Directs calls to a designated User ID when DSS function is active (*dss\_active* = true), the DSS port is assigned in the “answering” mailbox, and the Night Transfer on the DSS console is On.

Syntax: **KT (XXX) G (YYY)**

where:

**XXX**      Box number used when Night Transfer is On.

**YYY**      Box number used when Night Transfer is Off.

## Night Transfer Alternate Routing

The **KT( )** token is used by the Night Transfer Alternate Routing feature. The feature monitors the DSS/BLF console's Night Transfer key in order to activate the **KT( )** token for alternate routing applications.

Stratagy IVP8 cannot be programmed to monitor the Night Transfer key when programmed on a telephone only DSS Console. However, a Night Key can be programmed on both a telephone and DSS Console.

### Program Example

The following is an example on how to program this feature. In this example, we use:

- User ID: 900
- User ID when Night Transfer is On: 901
- User ID when Night Transfer is Off: 990

### ► To program the Stratagy IVP8 for Night Transfer Alternate Routing

1. Define the Users record to contain:

User ID 900	
Extension	@KT(901) G(990)
Do Not Disturb	OFF
Store Messages	NO
DSS Port	port number
<b>Note</b>	Set this field to the first port of the PDKU card designated for DSS/BLF console and defined by the console_slot_id parameter. If PDKU is in card slot 11, then DSS Port assignment is 0. Strata CTX/Strata DK assigns the first port of the slot 64 card as a DSS "host" port.

2. In the Stratagy System Configuration file:

- Set the *box\_grt* parameter for the specific port and type in **900**.

**Important!** Remember to program a User ID (e.g., User ID 991) as the Done Chain of the mailbox designated in the *box\_grt* parameter (in this example 900) to prevent the Stratagy IVP8 from entering a loop that can cause Stratagy IVP8 software to lock up. Refer to Technical Bulletin TB40-0002 "Programming Caution" available on the Internet FYI site.

- Activate the *dss\_active* parameter by setting it to **true**.

3. Access the User ID 901 mailbox via telephone and record greeting 1.

When the Night Transfer key is enabled, calls for the specific port are routed to User ID 901.  
When the Night Transfer key is disabled, calls route to User ID 990.

## %K Token

Stratagy IVP8 recognizes the Calling Party Identification when sent from the Strata CTX/Strata DK telephone system through a SMDI integration.

Once a value is determined to be a Calling Party ID number, it is stored in a buffer (**%K** token) for the duration of the call. A User ID programmed with a token application that reads the **%K** value performs the programmed function (e.g., a database look up for call routing based on the number calling). When the call is completed, the value stored in the buffer (**%K**) is cleared.

## SMDI Calling Party Identification

The Strata CTX/Strata DK telephone system only provides the Strategy IVP8 with incoming Calling Party ID via SMDI integration. Data messages or packets are sent into the system to provide information concerning the type of call and the calling party ID.

**Note** When configuring the Strategy IVP8 for SMDI, make sure both the Strategy IVP8 and the telephone system are configured concurrently. If the phone system is configured for a 10-digit Calling Party ID, the Strategy IVP8 must also have the proper 10-digit integration patterns in the System Integration Patterns screen (see [page 22](#)). Also make sure the correct notification template has been selected in the User ID Notify screen.

See [Chapter 11 – SMDI Serial Integration](#) in the *Strategy R3 I&M Manual* for detailed information on SMDI, caller ID, and %K token use.

## New User Tutorial Introductory Recording

The New User Tutorial feature plays a introduction prompt prior to beginning the tutorial. Strategy comes with a default recording that is saved in the system as a voice file called 'TUTORIAL.VOX'. This file can be found in the STRATAGY directory on the hard drive.

This prompt can be rerecorded to personalize the introductory recording. For example the recording could say, "The following is a new user tutorial that will walk you through the set up of your mailbox... Please see Jane Doe your Installation Coordinator for XYZ Telecom if you have any questions."

The default recording can be rerecorded by the use of Token Programming.

### Rerecord Tutorial

1. Create a new User ID in the system.
2. In the Extension field enter:
 

```
@KR(C:\\STRATAGY\\TUTORIAL.VOX)G(991)
```

  - @ stop normal processing
  - KR record a voice file
  - () file name and location within parentheses
  - G(991) Go to User ID 991
3. Call into the Strategy system and dial the newly created mailbox. A beep will be heard to indicate the start of recording.
4. Record the new TUTORIAL.VOX, finish recording by pressing #.
5. To rerecord, redial the mailbox number.
6. To playback the new recording, create an additional User ID with the following Token string in its Extension field:
 

```
@P(X,C:\\STRATAGY\\TUTORIAL.VOX)G(991)
```

  - @ stop normal processing
  - X valid DOS file name
  - () file name and location within parentheses
  - G(991) Go to User ID 991
7. As with all Token Programming, make sure that the Do Not Disturb feature is Off or the token program will not run.

## Step 14: (Optional) Shut Down Stratagy IVP8 System

The `restore_config` parameter defaults to true in the Stratagy System Configuration file (see [Chapter 3 – Configure Stratagy](#) in the *Stratagy R3 I&M Manual*) and enables the Automatic System Recovery process. The Stratagy IVP8 uses the Automatic System Recovery process (see [page 42](#)) to restore the last known good configuration if it encounters a problem on restart.

With `restore_config` set to true, you must now shut down and restart with the current software version (see [“Shut Down Stratagy IVP8”](#) on [page 40](#)) to save the revised configuration files, etc. This ensures that if an error is encountered during boot up the Stratagy IVP8 reboots using the most current database.

## Step 15: (Optional) Back up Database, Mailbox Names and Greetings

When you finish the installation process, we recommend you back up your new database, mailbox names and greetings. See [“Backup Utility”](#) on [page 33](#) for instructions.

The Strategy Admin software provides the utility and diagnostic programs to maintain and monitor the Strategy IVP8 system.

This chapter discusses:

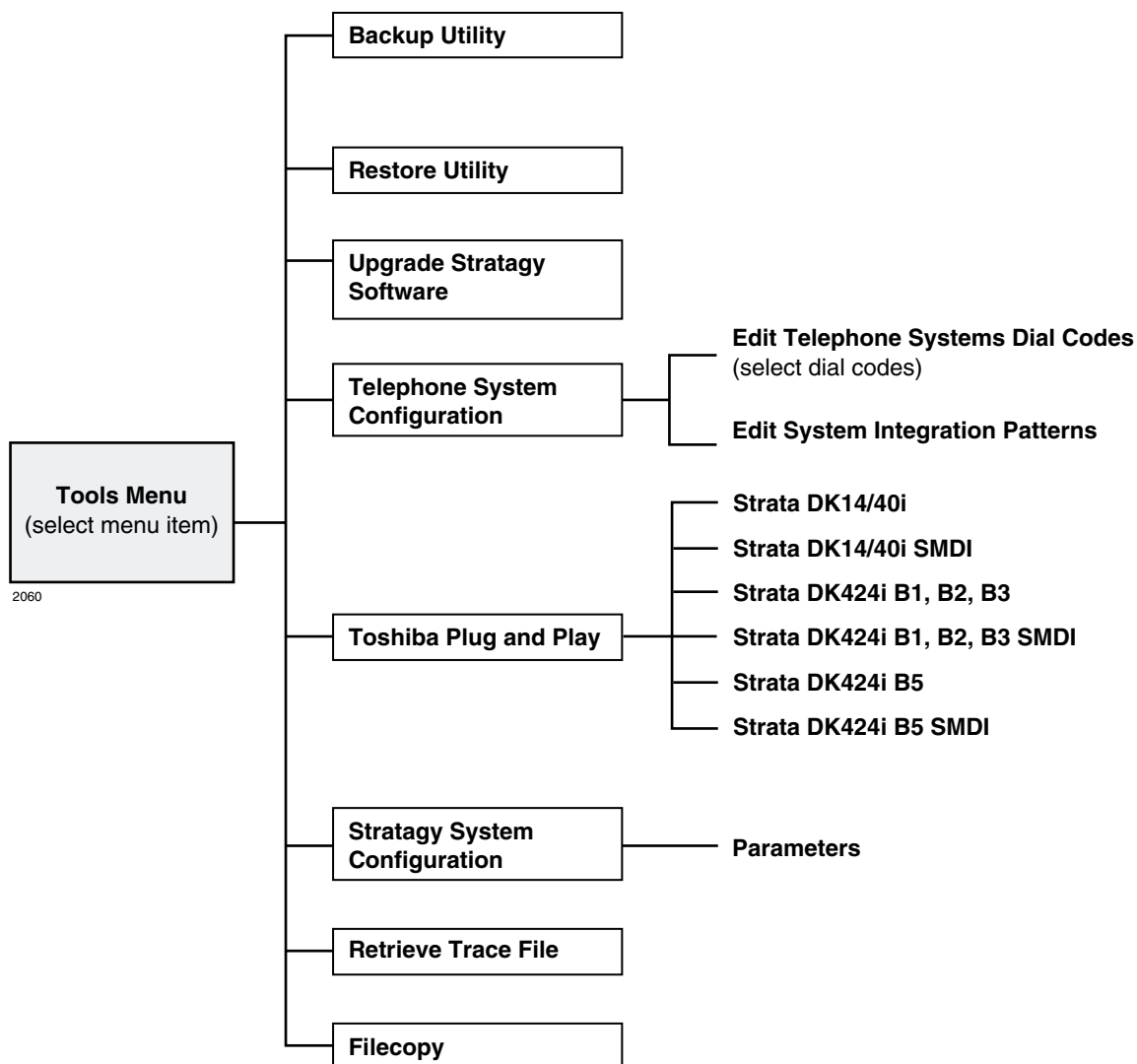
- **Tools Utility** – Available from the Main Menu, this utility consists of procedures that:
  - Back up and restore databases and/or mailbox names and greetings
  - Upgrade Strategy IVP8 software
  - Retrieve trace files
  - Copy files to and from the flash drive of the Strategy IVP8 and the hard drive of the Strategy Admin PC
  - Configure the Strategy IVP8 software
  - Change the Toshiba Plug and Play option
  - Modify codes and integration patterns using the Telephone System Configuration option

**Note** For instructions on using the Strategy System Configuration, Toshiba Plug and Play, and Telephone System Configurations options, see [Step 11: “Configure Strategy IVP8”](#) on [page 21](#).

- **Shut down the Strategy IVP8** – This function consists of six shutdown options: Shutdown and Restart Current Version; Shutdown and Trace Current Version; Shutdown and Start New Version; Shutdown and Start Old Version; Shutdown, Scandisk and Restart; and Shutdown and Stop for Power off.
- **Automatic System Recovery** – This feature controls the startup procedure in case a problem is detected during the restart process.
- **Diagnostics** – Strategy IVP8 has powerful troubleshooting tools. The following three files assist you in determining the source of a problem:
  - TRACE.OUT logs the Strategy IVP8’s activity.
  - STRATAGY.LOG contains information on how many channels (ports) the system started up with and the CKDB execution summary (tells you basically that all of your messages have a home), etc.
  - MSG.LOG logs all messages received and every mailbox that checks for messages along with the DMTF entered.
- **Strategy IVP8 Voice Port Upgrade** gives you information required when requesting a port upgrade.

# Tools

This section discusses the Tools menu (shown below). For the Telephone System Configuration, Toshiba Plug and Play, and Strategy System Configuration options, see [Step 11: “Configure Strategy IVP8”](#) on [page 21](#) for details.





## Backup Utility

The Strategy IVP8 Backup Utility is used to back up information from the Strategy IVP8 flash drive to the hard drive of the Strategy Admin PC.

---

**CAUTION!** Because of possible errors that can be induced through the telephone network, Toshiba advises that you perform the Backup Utility on site.

---

Backup functions are available for either a customer's database or mailbox names and greetings, or both. They consist of:

- **Database**  
All mailbox settings and information, Strategy IVP8 system configuration settings, notification templates, auto schedules, and all information concerning the selected telephone system's integration information.
- **Mailbox names and greetings**  
All names and greetings that have been recorded for all programmed mailboxes (personal and company).

Backing up your Strategy IVP8 system regularly enables you to restore the system with minimal data loss if the system fails.

**Note** Messages cannot be backed up.

---

**CAUTION!** During the Backup and Restore procedures, the Strategy IVP8 cannot process calls. When any Backup or Restore function is selected, Strategy Admin queries the Strategy IVP8 concerning calls currently in progress. If calls are in progress, Strategy Admin asks if the calls can be terminated. If call termination is selected, any current connection is disconnected, and all ports are commanded to go off-hook to prevent any further calls. If call termination is denied, the Backup or Restore procedure is halted.

If the connection between the Strategy Admin PC to the Strategy IVP8 is lost, communication can be re-established by simply shutting down and restarting the Strategy Admin in the usual manner.

If the connection between the Strategy Admin PC and the Strategy IVP8 is through the internal modem, that connection is the only one NOT dropped if a Backup or Restore function is selected. If this type of connection is dropped, the Strategy IVP8 port goes idle and accepts new incoming calls. Connection to the internal modem can be re-established through this port.

---

## Back up the Database(s)/Names/Greetings

1. From the Tools menu, press **Enter**.

2. From the Backup screen (shown at right), enter the selection number.

A second screen requesting a backup directory displays.



3. The directory defaults to **C:\ADMIN3\BACKUP** on the Strategy Admin PC. If you want the back up to be stored in a different directory, type over the default. Press **Enter**.

We recommend that the new directory name represent the site that is being backed up. For example, if backing up ABC Company, you can enter the directory name "**C:\ADMIN3\BACKUP\ABC**".

### Notes

- You cannot back up files to the Strategy Admin PC's floppy disk drive.
  - Be sure to enter the complete path, including the drive letter.
4. (Optional) If you entered selection 2 "Backup Names & Greetings" in [Step 2](#), you are asked to enter a beginning and ending mailbox number. Type the mailbox numbers and press **Enter** after each entry.

**Note** Leaving both fields blank defines all mailboxes.

...or if you entered selection 3 "Backup Database, Names & Greetings" in [Step 2](#), press **Enter** in the mailbox fields to leave them blank.

**Important!** *This selection backs up the entire database and all names and greetings. You cannot backup selective mailboxes.*

Before the backup starts, Strategy Admin calculates the time the backup takes and displays a status message (sample shown at right).



5. Verify that the Strategy Admin PC has enough available disk space to accommodate the backup file.

Based on the Strategy IVP8's estimated Backup time (shown on your screen), use the calculations shown below to estimate the required hard drive space.

Transmitting at:                      Bytes Per Second (bps) written to  
hard drive:

9600 bps	800 bytes
4800 bps	400 bytes
2400 bps	200 bytes

Example: If Strategy Admin displays a five minute backup time and communication is at 9600 bps, then:

5 minutes = 300 seconds

300 seconds x 800 bytes = 240,000 bytes

BPS values are not exact. Additional amounts have been factored in to estimate a higher quantity of space than is actually required.

6. If your Strategy Admin PC's hard drive has enough available disk space, press **Y** to backup the files

...or if not, press **N** to cancel the backup procedure.

7. Press **Y** to continue.

Would you like to shut down active voice channels? [NY]

3236

---

**CAUTION!** If Strategy IVP8 is not rebooted, all ports remain in an off-hook condition.

---

8. When the backup is complete, press **Y** to reboot Strategy IVP8. The Strategy Admin PC returns to the **C:\ADMIN3** DOS prompt.

**Note** You cannot reconnect to Strategy IVP8 using Strategy Admin until the Strategy IVP8 status light is green. Any attempt prior to that time fails.

## Restore Utility

---

**CAUTION!** Because of possible errors that can be induced through the telephone network, Toshiba advises that you perform the Restore Utility on site.

---

The Strategy IVP8 Restore Utility is used to restore previously backed up names, greetings and/or database from the Strategy Admin PC to the Strategy IVP8.

### Restore the Database(s)/Names/Greetings

---

**CAUTION!** Strategy IVP8 Voice Processing is suspended during the restore procedure. Any existing connection is broken. For additional information on the Restore procedure, see the Caution on [page 33](#).

---

1. From the Tools menu, press **2**.

2. From the Restore screen (shown at right), enter the selection number. A second screen displays requesting the source directory.

#### Restore

- 1.Restore Database
- 2.Restore Names & Greetings
- 3.Restore Database, Names & Greetings

3240

3. The directory defaults to **C:\ADMIN3\BACKUP** on the Strategy Admin PC. If you have the file(s) backed up to a different directory, type over the default. Press **Enter**.

#### Notes

- Restoring files from the Strategy Admin PC's floppy disk drive is not supported.
  - Be sure to enter the complete path, including the drive letter.
4. (Optional) If you entered selection 2 "Restore Names & Greetings" in [Step 2](#), you are asked to enter a beginning and ending mailbox number. Press **Enter** after each entry

**Note** Leaving both fields blank defines all mailboxes.

...or if you entered selection 3 "Restore Database, Names & Greetings" in [Step 2](#), press **Enter** in the mailbox number fields to leave them blank.

**Important!** *This selection restores the entire database and all names and greetings. You cannot restore selective mailboxes.*

Before the restore starts, Strategy Admin calculates the time the process takes and displays a status message (sample shown at right).

Restore time 3 min 50 sec. Continue? [NY]

3239

5. Press **Y** to restore the files  
...or **N** to cancel the procedure.

Would you like to shut down active voice channels? [NY]

3236

6. Press **Y** to continue.

---

**CAUTION!** If Strategy IVP8 is not rebooted, all ports remain in an off-hook condition.

---

7. When the restore is complete, press **Y** to reboot Strategy IVP8. The Strategy Admin PC returns to the **C:\ADMIN3** DOS prompt. When the Strategy IVP8 status light becomes a solid green, Strategy IVP8 is operational.

**Note** You cannot reconnect to Strategy IVP8 using Strategy Admin until the Strategy IVP8 status light is green. Any attempt prior to that time fails.

## Upgrade Strategy IVP8 Software

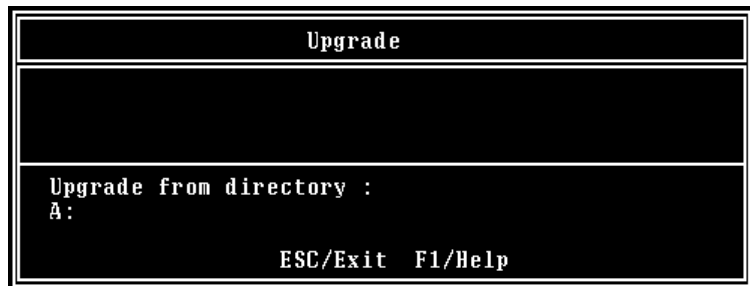
To upgrade Strategy IVP8 system software, you need the correct set of upgrade disk(s).

---

**CAUTION!** Because of possible errors that can be induced through the telephone network, Toshiba advises that you perform the Upgrade Utility on site.

---

1. From the Tools menu, press **3**. The Upgrade screen displays (shown at right).
2. Place the upgrade disk into the Strategy Admin PC's floppy disk drive.
3. The default directory is **A:**. If your Strategy Admin PC uses a different drive, type over the default. Press **Enter**.



3251

4. When the upgrade procedure is complete, press any key. The Strategy Admin PC returns to the **C:\ADMIN3** DOS prompt. When the Strategy IVP8 status light becomes a solid green, Strategy IVP8 is operational.

**Note** You cannot reconnect to Strategy IVP8 using Strategy Admin until the Strategy IVP8 status light is green. Any attempt prior to that time fails.

## Retrieve Trace File

This function copies the trace data log file (TRACE.OUT) to the Strategy Admin PC's hard drive. As part of this function, a Trace Filter Setup screen (see [Figure 5](#) on [page 38](#)) enables you to specify the filtering rules for selecting the desired trace records.

After Strategy Admin filters the trace data, it decodes and expands the data into readable records containing the information requested by you in the Trace Filter Setup screen.

**Note** The size of the trace file can be set using the *trace\_cap* parameter in the install.cfg file of Strategy IVP8 (see "*trace\_cap*" on [page 26](#) for a description of the parameter).

1. From the Tools menu, press **7**.
2. The trace file name defaults to **TRACE.OUT**. From the Retrieve Trace File screen, press **Enter**.
3. Enter the directory where you want to copy the file. The default is: **C:\ADMIN3**.



3237

If you need a different

directory, type over the default. Press **Enter**. Be sure to enter the complete path. If the directory already exists, you are given the option of entering a new directory or overwriting the file. The Trace Filter Setup screen displays (see [Figure 5](#) on [page 38](#)).

4. Select the items you want included in the **TRACE.OUT** file. Refer to the field descriptions on [page 38](#).
5. When you are finished, press **Alt+e**.

Once the data has been expanded, Strategy IVP8 copies the file to the directory/file specified in [Step 3](#) of this procedure. A dialog status box displays (shown at right).



3253

When the copy is complete, another status box displays (shown at right):



3254

You can use any text editor to review the file.

## Trace Filter Setup Screen

Trace Filter Setup		
SCREEN		
<b>Categories</b> Detail: NO Normal: YES Call Activity: NO Traffic: NO System: NO Error: NO	<b>Threads</b> Main: YES Interface: YES Event: YES Rover: YES Watch: YES SMDI: YES	<b>Parameters</b> Time: From: / / : : To: / / : : Channels List: 0 Mailboxes List: 0 0 0 0 0 0 0 0 0 0 0 0
Esc/Exit	F1/Help	Alt-E/Execute

3248

Figure 5 Trace Filter Setup Screen with System Defaults

The following fields appear on the screen:

Categories	Categories/classes of the traced records. Use the spacebar to toggle between Yes for inclusion of data or No for exclusion.
<b>Detail</b>	Detail system information. <b>Note</b> Since this information is very detailed and complex, it is only useful for advanced technical personnel trying to debug the system.
<b>Normal</b>	General system activities including digits dialed and boxes executed.
<b>Call Activity</b>	Log ins, log outs, messages received, and messages retrieved.
<b>Traffic</b>	Information concerning system load and possible problems caused by the load.
<b>System</b>	Control flow between functions.
<b>Error</b>	Abnormal conditions, faults, exceptions, etc.
Threads	Program processes. Use the spacebar to toggle between Yes for inclusion of data or No for exclusion.
<b>Main</b>	System messages and trace events relating to the overall system.
<b>Interface</b>	Communication protocol between the Strategy IVP8 and Strategy Admin.
<b>Event</b>	Anything that happens to the Strategy IVP8 from outside the system (e.g., detects voice, dial tones, ringing, etc.).
<b>Rover</b>	Actions that the Strategy IVP8 takes (e.g., notifications and internal scheduling).
<b>Watch</b>	Timers, system self-monitoring.
<b>SMDI</b>	SMDI information.
Parameters	Limiting factors (date/time range, channel information, mailbox information)
<b>Time From</b>	Starting date and time for trace data. Enter in dd/mm/yy hh:mm:ss format.

<b>Time To</b>	Ending date and time for trace data. Enter in dd/mm/yy hh:mm:ss format.
<b>Channels List</b>	Channel numbers. When no numbers are entered, all channels are included in the output.
<b>Mailboxes List</b>	When this parameter is used, only mailbox activities (log in, log out, message delivery, pickup, message delete, etc.) are displayed in the trace output. This option is useful when only mailbox activities need to be monitored.

## Filecopy

Use Strategy Admin's Filecopy option to copy files to and from the flash drive of the Strategy IVP8 and the Strategy Admin PC's hard drive.

- From the Tools menu, press **8**. The Filecopy screen displays (shown right).
- In the *Source System* field (where the file currently resides), press **F2** to display a pop-up box of selections.

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- Highlight **PC** to copy from the Strategy Admin PC or **Strategy** to copy from the Strategy IVP8. Press **Enter**.
- In the *Copy From* field, type the directory name, if necessary, and the file name.

**Note** If a directory name is not entered, Filecopy searches the Strategy IVP8 or Strategy Admin directory (Strategy Admin PC) for the file to be copied.

- Press **Enter** when finished.
- In the *Copy To* field, type the directory name, if necessary, and the file name.

**Note** If a directory name is not entered, Filecopy assigns the destination for the file to the Strategy IVP8 or Strategy Admin directory.

- Press **Enter** when finished. While Strategy IVP8 copies the file, a dialog status box displays (shown at right).

3253

When the copy is complete, this status box displays (shown right):

3254

- Press any key to continue.

# Shut Down Strategy IVP8

Occasionally you need to shut down, or exit, Strategy IVP8 call processing. Circumstances include:

- Turning power off to perform hardware maintenance
- Moving the system to another location

---

**CAUTION!** Never shut Strategy IVP8 down by turning off the Strata CTX/Strata DK's power. Doing so may corrupt the system files that are in use and damage the hard disk.

---

## Methods of Shutdown

Strategy IVP8 can be shut down in two ways:

- From a telephone dial pad
- From the Shutdown function on the Strategy Admin's Main Menu

### Shutdown Using the Telephone Dial Pad Method

**Important!** *System shutdown using the telephone dial pad is not operable if the Strategy Admin is connected.*

#### ► To enable shutdown procedure and change mailbox 983 security code

**Important!** *It is extremely important that the security code for mailbox 983 be changed. If the security code is not changed, it is possible for someone who knows Strategy IVP8's default password scheme to call into the system and shut it down.*

1. Using Strategy Admin, log on to the Strategy IVP8. The Strategy Admin Main Menu displays.
2. Press **Alt+U**. The Users Menu, Options screen displays.
3. In the *User ID* field, type **983** and press **Enter**. The Options screen displays for box 983.
4. Using the arrow down key, place the cursor in the *Security Code* field.
5. Type the new security code.

**Note** For added security, the security code does not appear on the screen as you type it.

6. Navigate to the *Do Not Disturb* field.
7. Press the spacebar to change the field from On to Off.

**Note** Changing the Do Not Disturb option enables the token programming residing in the *Extension* field of the mailbox. It is the token string in this mailbox that performs the shutdown procedure.

8. Press **Alt+S** to save the changes.

#### ► To shut down the Strategy IVP8 using the telephone dial pad

1. From the telephone dial pad, call Strategy IVP8. Once you dial into Strategy IVP8, the system answers with the standard company greeting. Strategy IVP8 prompts you to enter the User ID.
2. Enter **983**. Strategy IVP8 prompts you to enter the security code.

**Important!** *You must wait until the entire prompt has been played before entering the security code. If the code is entered prior to the completion of the prompt, the shutdown does not occur.*



3. Enter the new security code (the default is **983997**) and press **#**. All inactive channels are taken off-hook. All active channels are given a 60 second time delay to complete processing the current activity. After 60 seconds, they are disconnected and the system shuts down.

**Note** The Strategy IVP8 is completely shut down when the status light is Out and all port LEDs are On.

**Important!** *For security reasons, you should change the default security code.*

### Shutdown Using the Strategy Admin's Main Menu

1. From Strategy Admin's Main Menu, select Shutdown by pressing **Alt+s**. Strategy IVP8 asks for the password.
2. Enter the password (the default is **Strategy**) and press **Enter**. The screen enables you to select one of the following options:
  - Shutdown and Restart CURRENT Version — Restarts Strategy IVP8 (equivalent to pressing the **Esc** key on the current Strategy IVP8 platform).
  - Shutdown and Trace CURRENT Version — Shuts down, then restarts Strategy IVP8 in the TRACE mode (TRACE.OUT file is created) on Strategy IVP8's flash drive. See ["Trace"](#) on [page 42](#) for details.
  - Shutdown and Start NEW Version — Shuts down, then restarts Strategy IVP8 using the new database and new Strategy IVP8 system software, if any.
  - Shutdown and Start OLD Version — Shuts down, then restarts Strategy IVP8 using the software version previous to the upgraded software.
  - Shutdown, SCANDISK, and Restart — Shuts down, runs ScanDisk program and then restarts Strategy IVP8.

**Note** There is no screen interaction during the running of the ScanDisk Utility.

- Shutdown and STOP for power off — Takes Strategy IVP8 off-line and does not restart it.

#### Notes

- The Strategy IVP8 is completely shut down when the status light is Out and all port LEDs are On.
  - This option is not available when accessing Strategy IVP8 remotely.
  - This is the only option on the Shutdown menu that parks the head.
3. From the Shutdown Menu, highlight your selection and press **Enter**.
  4. If you chose the "Shutdown and STOP for power off" option, Strategy IVP8 asks you to confirm the shutdown. Type **Y** to confirm. The DOS prompt (**C:\ADMIN3**) displays.

### ► To restart/reset the Strategy IVP8 system after selecting "Shutdown and STOP for power off" option

**Note** If you select any of the first five options on the Shutdown Menu, Strategy IVP8 automatically restarts.

1. Holding the Strategy IVP8 by the edges or the strap, gently pull the card part way out of the slot. The card needs only to be pulled out so that the connectors do not meet.
2. Wait a few seconds and then gently push the card back into place. Apply firm, even pressure to ensure proper mating of the connectors. This automatically restarts the system and puts all channels on-hook and ready to accept calls.

# Automatic System Recovery

The Strategy IVP8 Release 3 software has a new feature called Automatic System Recovery. If an unsuccessful startup is detected by the program, the system copies the problem files to a subdirectory and restarts using the last successful startup files (i.e., Strategy IVP8 batch and configuration files, and mailbox database).

To receive notification of the unsuccessful startup, a new *error\_box* parameter enables you to designate an User ID Mailbox to receive the message. The Notify menu for the mailbox can be set for a new “Panic” notification type.

See the *Strategy R3 I&M Manual* for a complete description of this feature.

## Diagnostics

Strategy IVP8 has several very powerful troubleshooting tools—TRACE.OUT, STRATAGY.LOG, and MSG.LOG. All three of these files are stored in the Strategy IVP8 directory and are best utilized in combination with each other. For example, if you are looking for actions related to a specific message, enable MSG.LOG and start a trace. If you think you have a site with a power problem, viewing STRATAGY.LOG and TRACE.OUT would be the best course of action.

### Trace

Trace is a diagnostic tool designed to assist you in troubleshooting Strategy IVP8’s activity. When Trace is enabled, it is automatically turned on when Strategy IVP8 loads up and logs data until Strategy IVP8 software is shut down.

The Strategy IVP8 stores the trace data in a text file called TRACE.OUT. The size of the trace file can be configured using the *trace\_cap* parameter (see [Table 3](#)). This parameter defines the size of the trace file in kilobytes. When the size of the trace file reaches the setting limit, the existing file is overwritten, beginning with the oldest record.

To copy the TRACE.OUT file to the Strategy Admin PC’s hard drive, use the Retrieve Trace File option on the Tools menu (see [“Retrieve Trace File”](#) on [page 37](#)).

#### ► To enable TRACE.OUT

1. From the Main Menu, press **Alt+s** to select the shutdown function. Strategy IVP8 asks for the password.
2. Enter the password (the default is **Strategy**) and press **Enter**.
3. From the Shutdown Menu, highlight Shutdown and Trace CURRENT Version option. Press **Enter**. A dialog box displays asking you to confirm the shutdown.
4. Press **Y** to continue. Strategy IVP8 shuts down, then restarts in Trace mode. Trace runs continuously until Strategy IVP8 is shut down. The DOS prompt displays on the Strategy Admin PC.
5. (Optional) Restart Strategy Admin.

## STRATAGY.LOG

Stratagy IVP8 contains a file named STRATAGY.LOG that is written to every time the Stratagy IVP8 system properly shuts down and successfully boots up. If a Stratagy IVP8 system is turned off without a proper shutdown, there may be file corruption. A startup without a shutdown preceding it in the STRATAGY.LOG is the first indication.

Some of the information contained in this file is how many channels (ports) the system started up with and the CKDB execution summary that tells you basically that all of your messages have a home.

### ► To copy STRATAGY.LOG

1. From the Tools menu, press **8**. The Filecopy screen displays (see [page 39](#) for details).
2. Using the Filecopy option, copy the STRATAGY.LOG file to the Stratagy Admin PC's hard drive. You can view it using any common text editor.

## MSG.LOG

If you need to check actions related to specific types of messaging, you can enable MSG.LOG in the System Configuration file. In this file, Stratagy IVP8 logs every message received and every mailbox that checks for messages along with the DTMF entered.

**Important!** *Since the MSG.LOG file continuously collects information, we recommend that you do not enable the file unless you are looking for specific information. Otherwise, the file takes up space on the hard drive that could be used for message storage.*

### ► To enable MSG.LOG

1. From the Tools menu, press **6**. The system configuration file displays. The parameters are listed in alphabetical order.
2. Enable the `msg_log` parameter by removing the `#` sign in the string:  

```
#set msg_log 'MSG.LOG'
```

  
See Chapter 3 – Configuring Stratagy IVP8 in the *Stratagy R3 I&M Manual* for instructions.
3. Press **ESC**. The Stratagy System Config screen displays.
4. From the Stratagy System Config screen, press **1** to save your changes. Stratagy Admin transmits the file to the Stratagy IVP8.
5. When complete, press any key to continue. The system starts logging the information to the MSG.LOG file. The DOS prompt displays.
6. (Optional) Restart Stratagy Admin.

### ► To copy MSG.LOG

1. From the Tools menu, press **8**. The Filecopy screen displays (see [page 39](#) for details).
2. Using the Filecopy option, copy the STRATAGY.LOG file to the Stratagy Admin PC's hard drive. You can view it using any common text editor.

## Upgrading Strategy IVP8 Voice Ports

Upgrading the number of voice ports on the Strategy IVP8 does not require any hardware. Please call Customer Service with the following information:

- Dealer Name and Number
- Order Number
- Dealer Contact and telephone number
- Site telephone number
- Strategy IVP8's modem telephone number, if different from the site telephone number
- Strategy IVP8 system's password

The port upgrade is activated by Toshiba remotely.

**Note** The Strategy IVP8 must be reset for the new ports to be activated.

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